



# Chelmsford School Department School Committee

## *Notice of Public Meeting*

Email Posting to [townclerk@townofchelmsford.us](mailto:townclerk@townofchelmsford.us) Thank you.

As required by G.L. c. 30 A, §18-25

**DATE: Tuesday January 6, 2026 TIME: 6:00 p.m. ROOM: Conf. Room 1**

**PLACE: CPS Central Administration Office ADDRESS: 230 North Road**

Filed with Town Clerk:

The Chelmsford School Committee (CSC) intends to conduct an in-person meeting on the date and time specified. The meeting will be live-streamed by Chelmsford Telemedia for interested community members to access and watch. Interested community members may e-mail Superintendent of Schools, Dr. Jay Lang, at [langj@chelmsford.k12.ma.us](mailto:langj@chelmsford.k12.ma.us) prior to 12:00 p.m. on Tuesday January 6, 2026 to be scheduled to provide in-person input under the public participation portion(s) of the agenda.

### **CALL TO ORDER**

### **PLEDGE OF ALLEGIANCE**

### **CHAIR OPENING STATEMENT**

### **CONSENT AGENDA**

1. Approval of the minutes of the regular school committee meeting of December 16, 2025

### **CHS STUDENT REPRESENTATIVE ANNOUNCEMENTS**

### **GOOD NEWS**

### **PUBLIC COMMENTS:**

The School Committee will hear from members of the public on items listed under New Business on the posted agenda. Speakers are asked to limit comments to 3 minutes to allow others an opportunity to speak. The School Committee will not respond directly to public comments, however will try to address comments when the item is reached on the agenda.

### **NEW BUSINESS**

1. Spotlight on the Schools: Parker Middle School
2. Proposed 2026/27 School Year Calendar: Continued Discussion & Vote

3. Parker Middle School Building Project:
  - a. Education Program Endorsement
  - b. Grade Level Alignment Consideration
  - c. Review of Next Steps:
    - i. School Committee Decisions and Votes
    - ii. School Building Committee Decisions and Votes
    - iii. MSBA Review and Votes
4. 2025/26 CPS Student and Family Handbook Section Revisions
5. 2026/27 School Year – Kindergarten Registration Dates
6. Public Comment: CPS Bullying Prevention and Intervention Plan Update
7. Valley Collaborative FY2025 Annual Report and FY2025 Audit

#### **REPORTS**

1. Liaison Reports

#### **ACTION/NEW ITEMS**

1. Request for Reports & Updates

#### **PUBLIC COMMENTS:**

The School Committee will hear from members of the public on general matters of education interest. Speakers are asked to limit comments to 3 minutes to allow others an opportunity to speak. The School Committee will not respond directly to public comments, however will try to address comments at future meetings.

#### **ADJOURNMENT**

**CHELMSFORD SCHOOL COMMITTEE  
REGULAR MEETING  
December 16, 2025  
Meeting Minutes**

**Members Present:** Mr. Dennis King (Chair), Ms. Maria Santos (Vice Chair), Ms. Diana Lebeaux (Secretary), and Mr. John Moses. Ms. Susan Mackinnon is not present tonight.

**Also present:** Dr. Jay Lang (Superintendent), Dr. Linda Hirsch (Assistant Superintendent), and Ms. Joanna Johnson-Collins (Director of Business & Finance).

**Call to Order**

Mr. King called the meeting to order at 6:00 p.m.

**Pledge of Allegiance**

**Chair Opening Statement**

"This meeting is being live-streamed by Chelmsford Telemedia and posted to the CPS website for interested community members to access and watch. In-person public participation will be taking place tonight in accordance with the Chelmsford School Committee Public Participation Policy. Anyone speaking tonight during the public input portion of this meeting has notified the superintendent's office of their desire to speak and has been provided with these guidelines. Upon request written comments received no later than 12:00 p.m. on the day of this meeting will also be read and made part of the record of the meeting during the second public comment session."

**CONSENT AGENDA**

1. Approval of the minutes of the regular school committee meeting of December 2, 2025

**Ms. Santos moved to approve the minutes of the regular school committee meeting of December 2, 2025. Mr. Moses seconded. Motion carries 4-0.**

**CHS STUDENT REPRESENTATIVE ANNOUNCEMENTS**

Patrick shared that "Trade Week" started yesterday at CHS with The Regional Council of Carpenters coming. Today the National Aviation Academy spoke about aviation mechanics careers. Tomorrow the Army National Guard will come to talk about programs, scholarships and what the Army offers in many different trade areas. Franklin Tech will discuss many different trades on Thursday. Next Tuesday in The Learning Commons the acappella groups The Thursdays and The Crescendos will perform a "listening lunch" for students and staff.

Richie added that on December 6th through 8<sup>th</sup> The National Honor Society held festive tree fundraisers. Raffles were held, and proceeds were donated to the CPS Holiday Fund for Families in Need. On December 11<sup>th</sup> an amazing concert took place at the PAC. The Class of 2027 representatives held their annual "Holiday Lights" event in front of CHS,

## **GOOD NEWS**

Dr. Hirsch reminded all that schools will not be in session on December 24<sup>th</sup> and will return on January 5, 2026. Many school concerts are taking place in the next week for all to enjoy! Tomorrow night the third public forum will be held for the Parker Building Project.

## **PUBLIC COMMENTS:**

None

## **NEW BUSINESS**

### **1. Spotlight on the Departments: Science K-12**

Mr. Jon Morris, K – 12 Department Coordinator for Science, came to the table to provide updates on what is happening in science in the Chelmsford Public Schools. He began by talking about “Learning Walkthroughs”, one of which just took place today for grade 5 at Parker. The team included Mr. Morris, Dr. Hirsch, special educators, Mr. Blagg and Mr. Sousa. They look for “inclusive practices” in evidence in the classroom and follow up with discussions on how is this helpful for students and what can be shared with additional staff. They also look at UDL, behavioral interventions and SEL. The inclusive practice guidelines come directly from DESE. “Learning Walkthroughs” will continue at Parker and McCarthy as well.

Next Mr. Morris spoke of “New Performance Tasks” (new MCAS tests for grade 5 and 8 will begin in SY2027). DESE has shared these proposed tasks for districts to implement this year and to review and provide feedback. These are locally developed and use science issues happening in or near Chelmsford. For example, grade five studied the milfoil infestation problem at Freeman Lake. Grade 6 studied “sound waves” and suggested ways of having band and chorus performing in the music area simultaneously without hearing one another.

For upper middle school and high school science, once again, a \$50,000 grant from the State will fund the “Innovation Pathways” programs which focus on biotechnology and environmental technology. This also helps cover dual-enrollment costs for CHS students. Additionally, CHS was awarded a \$150,000 grant from DESE to cover equipment needed to enhance STEM experiences in Life Science and Engineering Pathways. The equipment is due to arrive right at the beginning of 2026. To fully appreciate this presentation, please view it in its entirety on Chelmsford Telemedia YouTube.

### **2. Presentation: Parker Middle School Building Project Update (Ai3 Architects)**

Dr. Lang invited Hamdi from Left Field and three individuals from Ai3 Architects to come to the table to provide The School Committee with an update on The Parker Building Project. Julie advised that currently the project is in MSBA’s “Feasibility & Long-Range Study”. There are five phases to the project to be completed in 2030. A proposed project may be put in front of The Town of Chelmsford to vote on appropriation of funds. If that is successful Phase Two will begin which entails the development of a physical building including all the construction documentation. Ai3 will return to a meeting in January to ascertain that The Committee has



reviewed The Educational Document and has approved a “draft” version of it. After that the full building committee will be able to submit the Package to the MSBA to complete “Step One” of the process (this is over 1,500 pages of reports and documentation). This will include information on the different enrollment options considered. The 14 options will be shared tomorrow night at the Community forum. The single option, when it has been chosen, at the end of the next phase called “The Schematic Design Phase” will be the single design going forward. Choosing a single option may take from four to six months. The Town will only vote on one option and the scope and budget for that one option.

The Educational Visioning included input from meetings with students, educators and community members and addressed instructional practices as well as grade configuration and facility needs. Details are included in the educational document which The School Committee will review as is required by the MSBA. This includes the three grade enrollment possibilities (grades 5-6, grades 4-6 and grades 5-8). When the phase is reached where a single grade configuration is chosen the final “educational program” will be inserted into the “Preferred Schematic Report” and then become finalized. The current step is the “draft” version. The **first decision** to be made will be “grade configuration”. The current draft is over 80 pages. A deep analysis of the four elementary schools revealed overcrowding that would be satisfied if the grade 4 classes were removed from each school. This data will be included in the full PDP submission to MSBA to be sent next month.

Tori spoke of development of the “Educational Program and Space Summary” which then fosters the creation of “Design Concepts” for the building, including not only classrooms but “public and shared spaces” within the school. This addresses interaction between students by creating grade-level neighborhoods and spaces for specialists (art/music/media). Health, OT, PT and PE will be found in the “wellness zone”. Chelmsford will require more spaces beyond those found in the MSBA guidelines. At next month’s meeting it is hoped that The School Committee will feel confident with and “endorse” the draft for submission to MSBA. By next October when The Feasibility Study has been completed and commitment has been made to the preferred option a total project budget will be revealed. This will be prior to asking The Town for funding. It is “highly unusual to come back to The Town for additional funds”! A 70 plus page draft summary of the project to date will be given to The School Committee by the end of this week so they will have time to see it before the next meeting on January 6, 2026. Changes can be made to this draft into the coming springtime. To full appreciate this detailed presentation you may view it on Chelmsford Telemedia YouTube.

### **3. Private School Approval Process and Request for Consideration: Drake Academy**

At our last meeting when Drake Academy was brought up for consideration, School Committee members had questions they wanted to be answered before deciding on this request. Along with a memorandum from Dr. Lang details of the full proposal for Drake Academy are included in tonight’s agenda packet. Ms. Esther Concepcion is here tonight to answer any additional questions The Committee might have. There were no additional questions.

**Ms. Santos moved to approve The Drake Academy of Excellence to operate a private school in The Town of Chelmsford consistent with the terms outlined in the Drake Academy of Excellence’s application dated December 10, 2025. Mr. Moses seconded. Motion carries 4-0.**

#### **4. SC Policy Action: IKFE – Competency Determination (CD)**

At the last meeting, Dr. Hirsch presented Policy IKFE – Competency Determination. This is on the agenda tonight for action by The Committee.

**Ms. Santos moved to approve the Competency Determination policy as presented. Mr. Moses seconded. Motion carries 4-0.**

#### **5. Parker Middle School Building Project – Community Visioning Sessions: a. Wednesday December 17, 2025 7:00 p.m. Chelmsford Elks, 300 Littleton Road**

Dr. Lang reminded all of this meeting tomorrow night. Once again, it will be taped by Chelmsford Telemedia.

#### **6. FY2027 Capital Plan Update**

Mr. King shared that most Committee Members attended The Tri-Board Meeting where this was presented. In tonight's agenda packet a memorandum and supporting document is included sent by John Sousa, Finance Director and Treasurer for The Town of Chelmsford, stating that six capital projects for the schools totaling \$2.56 million were recommended for approval. Mr. King shared that this "serves The Town well". Committee members thanked Mr. King for his work on capital planning.

#### **7. Proposed 2026/27 School Year Calendar**

Dr. Lang's memorandum in tonight's agenda packet provides for three different options for the school calendar for 2026/27. He shared that Labor Day does not take place until September 7<sup>th</sup>, which is the latest it can be. A complication in following the tradition of staff returning the Monday prior to Labor Day and students the next day is that local elections will be taking place at McCarthy Middle School on the first day for students. Any of the three options provide for a later date in June for schools to close for summer. Dr. Lang has had preliminary conversations with the Union about how this may affect the contracts if staff were to return on August 24, 2026. If this were preferred Dr. Lang will have conversations with the Teacher's Union about this scenario which is considered "option 4". The Committee would like Dr. Lang to discuss this option with the union and report back on the January 6, 2026 meeting date.

#### **8. Proposed FY2027 Budget Calendar**

Dr. Lang's memorandum details the dates for meetings about the proposed FY2027 Budget Calendar. He will present the budget on February 3<sup>rd</sup>, with a public hearing on the budget scheduled for February 24<sup>th</sup> which will be moved to March 3<sup>rd</sup> if February 24<sup>th</sup> brings inclement weather.

#### **9. Personnel Report: November 2025**

No action required.

## **10. Valley Collaborative Quarterly Report – FY2026 (1st Quarter)**

This report is shared in tonight's agenda packet.

**Ms. Santos moved to accept the presentation of the Quarterly Report of Valley Collaborative as presented. Mr. Moses seconded. Motion carries 4-0.**

### **REPORTS**

#### **1. Liaison Reports**

Ms. Santos stated that the CHS PTO met and spoke of the wonderful "Candy Land" based staff appreciation event. They are thankful to the administration for the support for these events.

Ms. Lebeaux attended the Parker/McCarthy PTO meeting. Parker held a successful craft fair on December 7<sup>th</sup>. They are kicking off the "Be the Change Project" where students give back to the community. This Thursday a school-wide music concert will be held during the school day. McCarthy held a pep rally with volleyball games and the winning team played against the staff. They are holding "Youth Science Career" events for students considering the STEM fields. On May 16<sup>th</sup> there will be a "Showboat" talent show for Parker and McCarthy. In May Parker will hold its "Pride Run".

The Chair added that SEPAC held a successful on-line meeting. They will be holding a second meeting in the New Year and are looking for people to serve on the board.

### **ACTION/NEW ITEMS**

None

### **PUBLIC COMMENTS:**

None

**ADJOURNMENT at 7:41 p.m.**

**Ms. Santos motioned to adjourn. Mr. Moses seconded. Motion carries 4-0.**

*Respectfully submitted,*

*Sharon Giglio, Recording Secretary*

# CHELMSFORD PUBLIC SCHOOLS

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Jay Lang, Ed.D., Superintendent

## **Memorandum**

To: Members of the School Committee  
From: Jay Lang, Ed.D., Superintendent of Schools  
Date: January 4, 2026  
Re: Spotlight on the Schools: Parker Middle School

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Attached please find a PowerPoint presentation provided by Parker Principal Joshua Blagg in advance of the meeting presentation. I look forward to hearing the presentation and discussing the good work that is occurring at Parker Middle School with the members of the school committee.



# **PARKER MIDDLE SCHOOL**

**Presentation to the  
School Committee**

**January 6, 2026**

# Agenda

- Parker School Improvement Plan
- Tier 2 Morning Interventions
- Student Ambassadors

# Meet the Team

- Student Ambassadors – Indira Singam, Jeffrey Long, Maddie Kowalik, and Kyle Bean
- DAIS Instructional Leaders: Jennifer Clark, Kristen Lyons, and Meghan Colon

# Parker School Improvement Plan

*Student Achievement Goal: During the 2025–2026 school year, Parker students will exceed 100% median to Typical Growth on the iReady spring 2026 Math diagnostic.*

- We are actively monitoring iReady student usage and benchmark data. Student progress and areas of need are targeted with Tier 2 interventions and supports. A WIN Block was instituted to create additional time for Tier 2 implementation throughout the school.



# School Wide Tier 2 Targeted Interventions

Academic- Reading, writing and math goals

Behavioral- Minor classroom infractions like task avoidance, calling out, or coming to class unprepared

Social Emotional- Growth Mindset, Self-management, Social Awareness or Emotion Regulation

**These targeted interventions are developed by the classroom teachers and implemented during class, WIN Block, or at the outset or close of a class depending upon the intervention.**

# **WIN (What I Need) Block**

- Added 25 minute WIN Block to the schedule every Wednesday

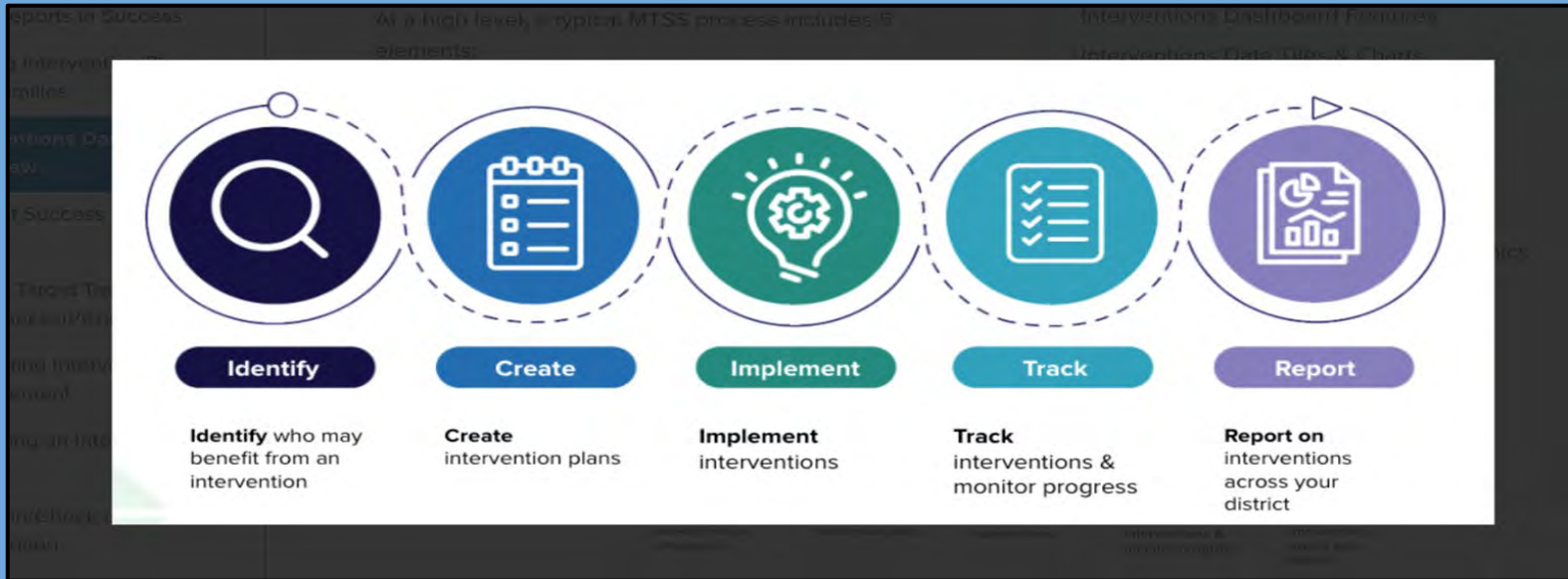
Utilized for :

- Targeted intervention
- Make up work
- Enrichment
- Whatever student needs

**Reflections from Maddie Kowalik**

# Panorama

Utilize Panorama to develop Tier 2 intervention groups and upload intervention plans and documentation.



# Parker School Improvement Goal

*Social Emotional Learning Goal: Parker will ensure students have strong relationships with staff and their peers so students feel welcomed, included and safe in school.*

- We have implemented a school wide SEL Block that meets at the same time on Wednesdays every week. Every staff member is assigned a small group of 10-12 students to deliver the Second Step social emotional curriculum. The smaller groups and utilization of all staff creates a more inclusive and safe environment where all students feel safe, seen, and heard.

# Parker School Improvement Goal

*Social Emotional Learning Goal: Parker will ensure students have strong relationships with staff and their peers so students feel welcomed, included and safe in school.*

- Clubs and Activities (Student Council, Best Buddies, Intramurals, Drama Club etc)
- Grade Level Socials, Service Projects like Be the Change, Showboat, and the the We Are Parker year end celebration
- Develop relationships with students and teachers in and out of class
- **Jeffrey Long** and **Kyle Bean** share their reflections

# **Tier 2 Morning Interventions**

Meet the DAIS Instructional Leadership Team:

**Jennifer Clark, Kristen Lyons, and Meghan Colon**

The DAIS (Diversity, Accessibility, Inclusion, and Support) Committee combines the MTSS and DEI committees working to ensure that all students are supported academically, emotionally, and behaviorally while providing an inclusive learning environment.

This year we continue to focus on targeted intervention and have implemented a new morning intervention program. See slides.

# New Parker School Visioning

- Reflections from **Indira Singam** and **Maddie Kowalik** on participating in the visioning sessions
- Learning what teachers saw as important
- Participating in discussions on creating a new building reflecting our core values and vision for the future of learning in schools
- Viewing pictures/layouts of new school buildings and giving insight into what students would find helpful and exciting
- Served as a voice for the students!

Thank  
you!

Questions?



# CHELMSFORD PUBLIC SCHOOLS

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Jay Lang, Ed.D., Superintendent

## **Memorandum**

To: Members of the School Committee  
From: Jay Lang, Ed.D., Superintendent of Schools  
Date: December 14, 2025  
Re: 2026/2027 School Calendar - Draft

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Attached are draft calendar options for the 2026/27 academic year for the school committee to review, discuss and approve at the regular meeting on December 16, 2025.

We have constraints on the annual school calendar such that the school year (1<sup>st</sup> day teachers report to work) cannot begin earlier than the Monday before Labor Day. This is referenced in Article 5-01 of the collective bargaining agreement between the Chelmsford School Committee and Chelmsford Federation of Teachers, Teachers and Nurses bargaining unit. For the last eight or nine years teachers have reported the Monday before Labor Day for orientation, students in grades 1 – 9 have reported Tuesday (incoming 9<sup>th</sup> grade students have had an orientation day with their upper grade level student mentors, and Kindergarten orientation was held), and all students (K - 12) returned Wednesday and Thursday for regular days of school. While not a holiday, we have taken the Friday before Labor Day off to make an extra-long Labor Day weekend. This has been very well received and the three days of school prior to Labor Day have allowed teachers to establish norms with students, review course requirements for the year, and begin to develop routines. This “traditional” school calendar is included as Option 1.

As we briefly discussed at our last meeting, Labor Day is very late this coming year falling on September 7. We were notified by the town clerk that the Massachusetts state primary election will be held the Tuesday before Labor Day, September 1. The town clerk has requested we do not have students present on September 1 to conflict with the state primary election. While I appreciate it would be easier for the town clerk if no one was present at McCarthy for voting purposes, it is incredibly disruptive to the entire district if school were not to be held on election days. McCarthy is the only school that is a voting site, the other seven schools in the district (Byam, Center, Harrington, South Row, Parker, McCarthy, CHS and Westlands) are not voting sites and would be negatively impacted by such a practice. McCarthy has worked very closely with the police department to control traffic flow in/out of the property and school so students and voters are minimally impacted. While also an inconvenience for the school

# CHELMSFORD PUBLIC SCHOOLS

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Jay Lang, Ed.D., Superintendent

to be a voting site, they have made the best of it. I personally do not support the district having “no school” on election days. Continuity in schedules for families, students and staff is essential.

If the school committee elects to not hold school for students on the state primary election day, I have provided for such in Options 2 and 3. Option 2 is a draft calendar with staff returning Tuesday September 1 for orientation, followed by students in Grades 1 – 9 reporting for their first day Wednesday September 2, and all students reporting Thursday September 3. In Option 2, we continue with a 4-day extra-long Labor Day weekend (no school on Friday September 4 and Monday September 7). This pushes the last scheduled day for students to Friday June 25, 2027 and staff to Monday June 28, 2027. Further, students in Grades 1 – 9 are returning for only 2 days of school prior to the Labor Day and students in grades 10 – 12 only return for 1 day prior to Labor Day. Option 3 is a draft calendar with staff returning Tuesday September 1 for orientation, followed by students in Grades 1 – 9 reporting for their first day Wednesday September 2, and all students reporting Thursday September 3 and Friday September 4. This allows for students in Grades 1 – 9 to return for the traditional 3 days of school prior to the Labor Day and students in grades 10 – 12 to return for 2 days of school prior to Labor Day. This backs up the last scheduled day for students to Thursday June 24, 2027 and staff to Friday June 25, 2027.

These are the three options I see most viable for discussion purposes Tuesday evening. If Committee Members have other ideas they would like me to run scenarios for, I am happy to do so if shared. Of the three options presented, my recommendation in preferential order is as follows:

- |              |                                                                 |
|--------------|-----------------------------------------------------------------|
| 1.) Option 1 | Traditional Calendar                                            |
| 2.) Option 3 | No Students Election Day – School on Friday Before Labor Day    |
| 3.) Option 2 | No Students Election Day – No School on Friday Before Labor Day |

# CPS 2026 – 2027 ACADEMIC CALENDAR

Option 1: Traditional

## AUGUST

26-27 New Staff Orientation  
31 No School Staff Orientation

| AUGUST 2026 |    |    |    |    |    |    |
|-------------|----|----|----|----|----|----|
| S           | M  | T  | W  | Th | F  | S  |
|             |    |    |    |    |    | 1  |
| 2           | 3  | 4  | 5  | 6  | 7  | 8  |
| 9           | 10 | 11 | 12 | 13 | 14 | 15 |
| 16          | 17 | 18 | 19 | 20 | 21 | 22 |
| 23          | 24 | 25 | 26 | 27 | 28 | 29 |
| 30          | 31 |    |    |    |    |    |

## SEPTEMBER 2026

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    | 1  | 2  | 3  | 4  | 5  |
| 6  | 7  | 8  | 9  | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 |    |    |    |

## SEPTEMBER

**1 Grades 1 – 9 ONLY**  
**Kindergarten Orientation**  
2 All Students  
4 No School  
7 No School  
23 Half Day (Professional Day)

**SEPTEMBER Student Days: 20**

## OCTOBER

12 No School (Columbus Day)  
22 Half Day (Professional Day)

| OCTOBER 2026 |    |    |    |    |    |    |
|--------------|----|----|----|----|----|----|
| S            | M  | T  | W  | Th | F  | S  |
|              |    |    |    | 1  | 2  | 3  |
| 4            | 5  | 6  | 7  | 8  | 9  | 10 |
| 12           | 12 | 13 | 14 | 15 | 16 | 17 |
| 18           | 19 | 20 | 21 | 22 | 23 | 24 |
| 25           | 26 | 27 | 28 | 29 | 30 | 31 |

**OCTOBER Student Days: 21**

## NOVEMBER 2026

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 |    |    |    |    |    |

## NOVEMBER

3 No School (Full Prof. Day)  
11 No School (Veteran's Day)  
18 Half Day ELEM. & MS ONLY  
25 Early Release (Thanksgiving Recess)  
26 No School (Thanksgiving)  
27 No School

**NOVEMBER Student Days: 17**

## DECEMBER

10 Half Day (Professional Day)  
24 December Recess

| DECEMBER 2026 |    |    |    |    |    |    |
|---------------|----|----|----|----|----|----|
| S             | M  | T  | W  | Th | F  | S  |
|               |    | 1  | 2  | 3  | 4  | 5  |
| 6             | 7  | 8  | 9  | 10 | 11 | 12 |
| 13            | 14 | 15 | 16 | 17 | 18 | 19 |
| 20            | 21 | 22 | 23 | 24 | 25 | 26 |
| 27            | 28 | 29 | 30 | 31 |    |    |

**DECEMBER Student Days: 17**

## JANUARY 2027

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    |    | 1  | 2  |
| 3  | 4  | 5  | 6  | 7  | 8  | 9  |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 |    |    |    |    |    |    |

## JANUARY

4 School Re-opens  
12 Half Day (Professional Day)  
18 No School (Martin Luther King Day)

**JANUARY Student Days: 19**

## FEBRUARY

4 Half-Day (Professional Day)  
15 February Recess  
22 School Re-opens

| FEBRUARY 2027 |    |    |    |    |    |    |
|---------------|----|----|----|----|----|----|
| S             | M  | T  | W  | Th | F  | S  |
|               | 1  | 2  | 3  | 4  | 5  | 6  |
| 7             | 8  | 9  | 10 | 11 | 12 | 13 |
| 14            | 15 | 16 | 17 | 18 | 19 | 20 |
| 21            | 22 | 23 | 24 | 25 | 26 | 27 |
| 28            |    |    |    |    |    |    |

**FEBRUARY Student Days: 15**

## MARCH 2027

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    | 1  | 2  | 3  | 4  | 5  | 6  |
| 7  | 8  | 9  | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 |    |    |    |

## MARCH

10 Half Day (Professional Day)

**MARCH Student Days: 23**

## APRIL

6 Half-Day (Professional Day)  
19 April Recess  
26 School Re-opens

| APRIL 2027 |    |    |    |    |    |    |
|------------|----|----|----|----|----|----|
| S          | M  | T  | W  | Th | F  | S  |
|            |    |    |    | 1  | 2  | 3  |
| 4          | 5  | 6  | 7  | 8  | 9  | 10 |
| 11         | 12 | 13 | 14 | 15 | 16 | 17 |
| 18         | 19 | 20 | 21 | 22 | 23 | 24 |
| 25         | 26 | 27 | 28 | 29 | 30 |    |

**APRIL Student Days: 17**

## MAY 2027

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    |    |    | 1  |
| 2  | 3  | 4  | 5  | 6  | 7  | 8  |
| 9  | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 |    |    |    |    |    |

## MAY

31 No School (Memorial Day)

**MAY Student Days: 20**

## JUNE

18 No School (Juneteenth)  
24 Last Day for Students (Half Day)  
25 Last Day for Staff (Half Day)

| JUNE 2027 |    |    |    |    |    |    |
|-----------|----|----|----|----|----|----|
| S         | M  | T  | W  | Th | F  | S  |
|           |    | 1  | 2  | 3  | 4  | 5  |
| 6         | 7  | 8  | 9  | 10 | 11 | 12 |
| 13        | 14 | 15 | 16 | 17 | 18 | 19 |
| 20        | 21 | 22 | 23 | 24 | 25 | 26 |
| 27        | 28 | 29 | 30 |    |    |    |

**JUNE Student Days: 17**

**Total Student Days: 186**

Additional Staff Days: 2.5  
(Total Includes Six Provisional Snow Days)

Professional Development

Last day Students June 24  
Last day Staff June 25

# CPS 2026 – 2027 ACADEMIC CALENDAR

Option 2: No Election Day

**AUGUST**  
26-27 New Staff Orientation

| AUGUST 2026 |    |    |    |    |    |    |
|-------------|----|----|----|----|----|----|
| S           | M  | T  | W  | Th | F  | S  |
|             |    |    |    |    |    | 1  |
| 2           | 3  | 4  | 5  | 6  | 7  | 8  |
| 9           | 10 | 11 | 12 | 13 | 14 | 15 |
| 16          | 17 | 18 | 19 | 20 | 21 | 22 |
| 23          | 24 | 25 | 26 | 27 | 28 | 29 |
| 30          | 31 |    |    |    |    |    |

## SEPTEMBER 2026

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    | 1  | 2  | 3  | 4  | 5  |
| 6  | 7  | 8  | 9  | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 |    |    |    |

## SEPTEMBER

1 No School Staff Orientation  
**2 Grades 1 – 9 ONLY**  
**Kindergarten Orientation**  
 3 All Students  
 4 No School  
 7 No School  
 23 Half Day (Professional Day)

**SEPTEMBER Student Days: 19**

**OCTOBER**  
 12 No School (Columbus Day)  
 22 Half Day (Professional Day)

| OCTOBER 2026 |    |    |    |    |    |    |
|--------------|----|----|----|----|----|----|
| S            | M  | T  | W  | Th | F  | S  |
|              |    |    |    | 1  | 2  | 3  |
| 4            | 5  | 6  | 7  | 8  | 9  | 10 |
| 12           | 12 | 13 | 14 | 15 | 16 | 17 |
| 18           | 19 | 20 | 21 | 22 | 23 | 24 |
| 25           | 26 | 27 | 28 | 29 | 30 | 31 |

**OCTOBER Student Days: 21**

## NOVEMBER 2026

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 |    |    |    |    |    |

## NOVEMBER

3 No School (Full Prof. Day)  
 11 No School (Veteran's Day)  
 18 Half Day ELEM. & MS ONLY  
 25 Early Release (Thanksgiving Recess)  
 26 No School (Thanksgiving)  
 27 No School

**NOVEMBER Student Days: 17**

**DECEMBER**  
 10 Half Day (Professional Day)  
 24 December Recess

| DECEMBER 2026 |    |    |    |    |    |    |
|---------------|----|----|----|----|----|----|
| S             | M  | T  | W  | Th | F  | S  |
|               |    | 1  | 2  | 3  | 4  | 5  |
| 6             | 7  | 8  | 9  | 10 | 11 | 12 |
| 13            | 14 | 15 | 16 | 17 | 18 | 19 |
| 20            | 21 | 22 | 23 | 24 | 25 | 26 |
| 27            | 28 | 29 | 30 | 31 |    |    |

**DECEMBER Student Days: 17**

## JANUARY 2027

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    |    | 1  | 2  |
| 3  | 4  | 5  | 6  | 7  | 8  | 9  |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 |    |    |    |    |    |    |

## JANUARY

4 School Re-opens  
 12 Half Day (Professional Day)  
 18 No School (Martin Luther King Day)

**JANUARY Student Days: 19**

**FEBRUARY**  
 4 Half-Day (Professional Day)  
 15 February Recess  
 22 School Re-opens

| FEBRUARY 2027 |    |    |    |    |    |    |
|---------------|----|----|----|----|----|----|
| S             | M  | T  | W  | Th | F  | S  |
|               | 1  | 2  | 3  | 4  | 5  | 6  |
| 7             | 8  | 9  | 10 | 11 | 12 | 13 |
| 14            | 15 | 16 | 17 | 18 | 19 | 20 |
| 21            | 22 | 23 | 24 | 25 | 26 | 27 |
| 28            |    |    |    |    |    |    |

**FEBRUARY Student Days: 15**

## MARCH 2027

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    | 1  | 2  | 3  | 4  | 5  | 6  |
| 7  | 8  | 9  | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 |    |    |    |

## MARCH

10 Half Day (Professional Day)

**MARCH Student Days: 23**

**APRIL**  
 6 Half-Day (Professional Day)  
 19 April Recess  
 26 School Re-opens

| APRIL 2027 |    |    |    |    |    |    |
|------------|----|----|----|----|----|----|
| S          | M  | T  | W  | Th | F  | S  |
|            |    |    |    | 1  | 2  | 3  |
| 4          | 5  | 6  | 7  | 8  | 9  | 10 |
| 11         | 12 | 13 | 14 | 15 | 16 | 17 |
| 18         | 19 | 20 | 21 | 22 | 23 | 24 |
| 25         | 26 | 27 | 28 | 29 | 30 |    |

**APRIL Student Days: 17**

## MAY 2027

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    |    |    | 1  |
| 2  | 3  | 4  | 5  | 6  | 7  | 8  |
| 9  | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 |    |    |    |    |    |

## MAY

31 No School (Memorial Day)

**MAY Student Days: 20**

**JUNE**  
 18 No School (Juneteenth)  
 24 Last Day for Students (Half Day)  
 25 Last Day for Staff (Half Day)

| JUNE 2027 |    |    |    |    |    |    |
|-----------|----|----|----|----|----|----|
| S         | M  | T  | W  | Th | F  | S  |
|           |    | 1  | 2  | 3  | 4  | 5  |
| 6         | 7  | 8  | 9  | 10 | 11 | 12 |
| 13        | 14 | 15 | 16 | 17 | 18 | 19 |
| 20        | 21 | 22 | 23 | 24 | 25 | 26 |
| 27        | 28 | 29 | 30 |    |    |    |

**JUNE Student Days: 18**

**Total Student Days: 186**

Additional Staff Days: 2.5  
 (Total Includes Six Provisional Snow Days)

Professional Development

Last day Students June 25  
 Last day Staff June 28

# CPS 2026 – 2027 ACADEMIC CALENDAR

## Option 3: No Election Day – Include Friday Before Labor Day

### AUGUST

26-27 New Staff Orientation

| AUGUST 2026 |    |    |    |    |    |    |
|-------------|----|----|----|----|----|----|
| S           | M  | T  | W  | Th | F  | S  |
|             |    |    |    |    |    | 1  |
| 2           | 3  | 4  | 5  | 6  | 7  | 8  |
| 9           | 10 | 11 | 12 | 13 | 14 | 15 |
| 16          | 17 | 18 | 19 | 20 | 21 | 22 |
| 23          | 24 | 25 | 26 | 27 | 28 | 29 |
| 30          | 31 |    |    |    |    |    |

### SEPTEMBER 2026

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    | 1  | 2  | 3  | 4  | 5  |
| 6  | 7  | 8  | 9  | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 |    |    |    |

### SEPTEMBER

1 No School Staff Orientation  
**2 Grades 1 – 9 ONLY**  
**Kindergarten Orientation**  
 3 All Students  
 7 No School  
 23 Half Day (Professional Day)

**SEPTEMBER Student Days: 20**

### OCTOBER

12 No School (Columbus Day)  
 22 Half Day (Professional Day)

| OCTOBER 2026 |    |    |    |    |    |    |
|--------------|----|----|----|----|----|----|
| S            | M  | T  | W  | Th | F  | S  |
|              |    |    |    | 1  | 2  | 3  |
| 4            | 5  | 6  | 7  | 8  | 9  | 10 |
| 12           | 12 | 13 | 14 | 15 | 16 | 17 |
| 18           | 19 | 20 | 21 | 22 | 23 | 24 |
| 25           | 26 | 27 | 28 | 29 | 30 | 31 |

**OCTOBER Student Days: 21**

### NOVEMBER 2026

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 |    |    |    |    |    |

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3 No School (Full Prof. Day)  
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 18 Half Day ELEM. & MS ONLY  
 25 Early Release (Thanksgiving Recess)  
 26 No School (Thanksgiving)  
 27 No School

**NOVEMBER Student Days: 17**

### DECEMBER

10 Half Day (Professional Day)  
 24 December Recess

| DECEMBER 2026 |    |    |    |    |    |    |
|---------------|----|----|----|----|----|----|
| S             | M  | T  | W  | Th | F  | S  |
|               |    | 1  | 2  | 3  | 4  | 5  |
| 6             | 7  | 8  | 9  | 10 | 11 | 12 |
| 13            | 14 | 15 | 16 | 17 | 18 | 19 |
| 20            | 21 | 22 | 23 | 24 | 25 | 26 |
| 27            | 28 | 29 | 30 | 31 |    |    |

**DECEMBER Student Days: 17**

### JANUARY 2027

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    |    | 1  | 2  |
| 3  | 4  | 5  | 6  | 7  | 8  | 9  |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 |    |    |    |    |    |    |

### JANUARY

4 School Re-opens  
 12 Half Day (Professional Day)  
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 22 School Re-opens

| FEBRUARY 2027 |    |    |    |    |    |    |
|---------------|----|----|----|----|----|----|
| S             | M  | T  | W  | Th | F  | S  |
|               | 1  | 2  | 3  | 4  | 5  | 6  |
| 7             | 8  | 9  | 10 | 11 | 12 | 13 |
| 14            | 15 | 16 | 17 | 18 | 19 | 20 |
| 21            | 22 | 23 | 24 | 25 | 26 | 27 |
| 28            |    |    |    |    |    |    |

**FEBRUARY Student Days: 15**

### MARCH 2027

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    | 1  | 2  | 3  | 4  | 5  | 6  |
| 7  | 8  | 9  | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 |    |    |    |

### MARCH

10 Half Day (Professional Day)

**MARCH Student Days: 23**

### APRIL

6 Half-Day (Professional Day)  
 19 April Recess  
 26 School Re-opens

| APRIL 2027 |    |    |    |    |    |    |
|------------|----|----|----|----|----|----|
| S          | M  | T  | W  | Th | F  | S  |
|            |    |    |    | 1  | 2  | 3  |
| 4          | 5  | 6  | 7  | 8  | 9  | 10 |
| 11         | 12 | 13 | 14 | 15 | 16 | 17 |
| 18         | 19 | 20 | 21 | 22 | 23 | 24 |
| 25         | 26 | 27 | 28 | 29 | 30 |    |

**APRIL Student Days: 17**

### MAY 2027

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    |    |    | 1  |
| 2  | 3  | 4  | 5  | 6  | 7  | 8  |
| 9  | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 |    |    |    |    |    |

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**MAY Student Days: 20**

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 24 Last Day for Students (Half Day)  
 25 Last Day for Staff (Half Day)

| JUNE 2027 |    |    |    |    |    |    |
|-----------|----|----|----|----|----|----|
| S         | M  | T  | W  | Th | F  | S  |
|           |    | 1  | 2  | 3  | 4  | 5  |
| 6         | 7  | 8  | 9  | 10 | 11 | 12 |
| 13        | 14 | 15 | 16 | 17 | 18 | 19 |
| 20        | 21 | 22 | 23 | 24 | 25 | 26 |
| 27        | 28 | 29 | 30 |    |    |    |

**JUNE Student Days: 17**

**Total Student Days: 186**

Additional Staff Days: 2.5  
 (Total Includes Six Provisional Snow Days)

Professional Development

Last day Students June 24  
 Last day Staff June 25





# Parker Middle School Building Project

School Committee // January 6, 2026



## *Agenda*

- // Educational Program Endorsement
- // Grade Level Alignment Consideration
- // Review of Next Steps
  - / School Committee Decisions & VOTE
  - / School Building Committee Decisions & VOTES
  - / MSBA Review



**CHELMSFORD**  
PUBLIC SCHOOLS



<http://parkermssproject.com>

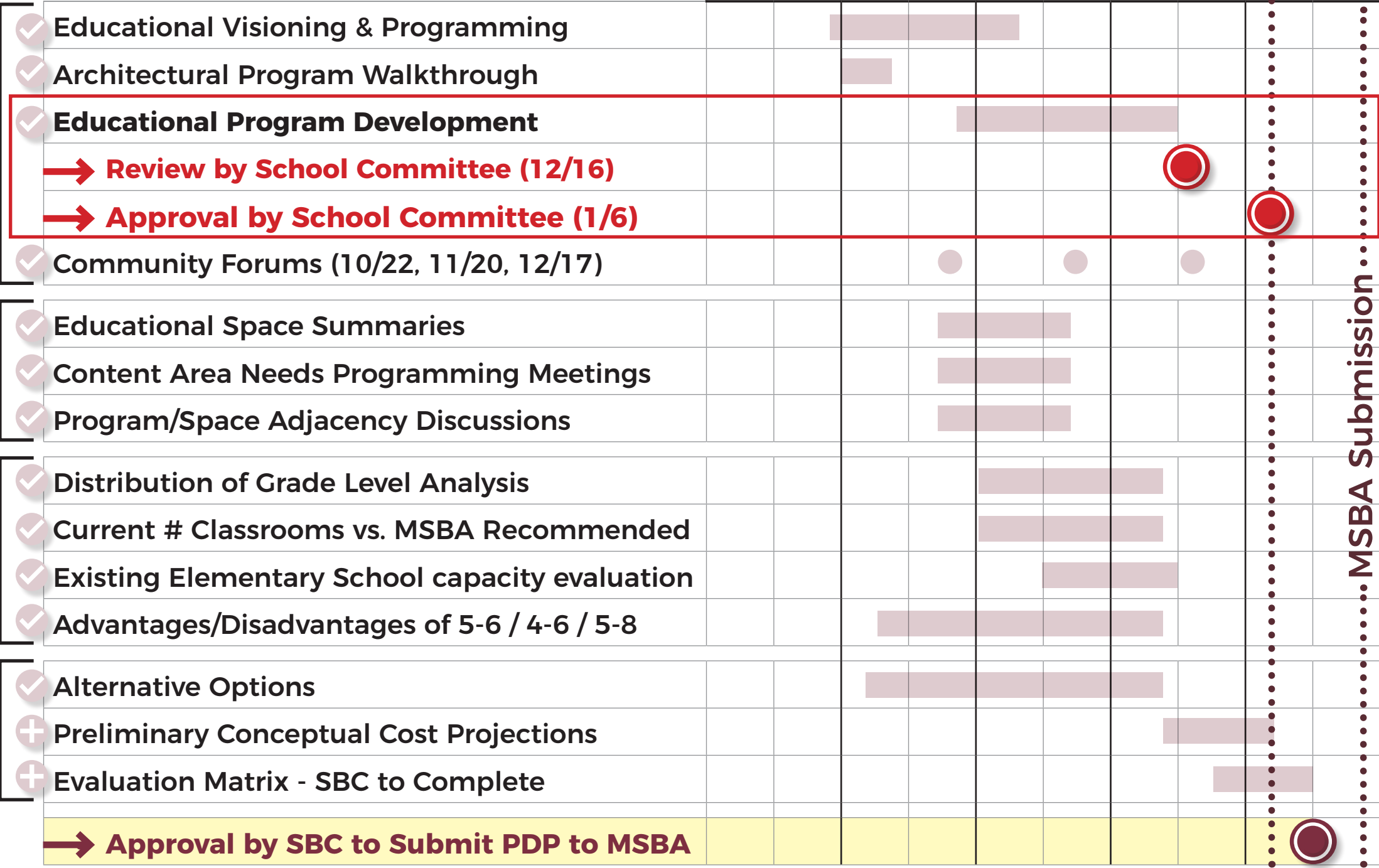
# Step 1: Critical Path to PDP

Educational Visioning  
& Programming

Initial Educational  
Space Summary

Evaluation of Design  
Enrollment  
*(5-6 vs. 4-6 vs. 5-8)*

Preliminary  
Evaluation of Options



MSBA Submission

# In Summary: Approval for Submission

Preliminary Design Program (PDP) Submission to MSBA

What is the School Committee being asked to  
**APPROVE** at this time?

**VOTE** to approve the  
**Educational Program Narrative**  
and include the document as part of the  
**Feasibility Study - Preliminary Design  
Program (PDP) Report to the MSBA for  
consideration.**

**DOES NOT INCLUDE:**

- // Specific building drawings or designs, at this point
- // Specific site drawings or designs, at this point
- // Town commitment to fund a project, at this point



# Goals of the Educational Program

## Overview

PER

**MSBA:**

“ To ensure that school projects are responsive to the educational needs of a District, the MSBA requires the District to:

- 1) document its existing educational program and,**
- 2) define proposed educational activities.**

Only then can the district work effectively with its designer, OPM, and local stakeholders **to develop, evaluate, and select a design** that supports its educational objectives/needs.

Establishing a comprehensive and thoughtful educational program also **helps to provide for future flexibility** to adapt to changes in programming or teaching methodologies over the useful life of the school.

”

The School Committee shall review & approve



### Parker Middle School Educational Program

#### MODULE 3: PRELIMINARY DESIGN PROGRAM

##### Table of Contents

- 1. INTRODUCTION
- 2. GRADE & SCHOOL CONFIGURATION POLICIES
- 3. CLASS SIZE POLICIES
- 4. SCHOOL SCHEDULING METHODS
- 5. TEACHING METHODOLOGY AND STRUCTURE
- 6. TEACHER PLANNING
- 7. PROFESSIONAL DEVELOPMENT
- 8. PRE-KINDERGARTEN
- 9. KINDERGARTEN
- 10. LUNCH PROGRAMS
- 11. TECHNOLOGY INSTRUCTION POLICIES AND PROGRAM REQUIREMENTS
- 12. MEDIA CENTER/LIBRARY
- 13. VISUAL ARTS PROGRAMS
- 14. PERFORMING ARTS PROGRAMS
- 15. PHYSICAL EDUCATION AND WELLNESS
- 16. SPECIAL EDUCATION
- 17. VOCATIONS AND TECHNOLOGY PROGRAMS
- 18. TRANSPORTATION POLICIES
- 19. FUNCTIONAL AND SPATIAL RELATIONSHIPS AND KEY ADJACENCIES
- 20. SECURITY AND VISUAL ACCESS REQUIREMENTS
- 21. TYPICAL DAY AND WEEK IN THE LIFE OF A STUDENT

Chelmsford Educational Program  
Contents (86+ pages)

# Educational Program Highlights

The **SUCCESSFUL** Parker Middle School will...

// **PROVIDE** a full range of programs consistent with state and approved local requirements, **currently limited by facility constraints.**

// **INTEGRATE** STEM/STEAM and maker space activities into the curriculum, **currently restricted by a lack of space.**

// **ENSURE** ample and appropriate spaces for differentiated instruction, small group work, and Tier II academic interventions, **which are currently severely lacking.**

// **DELIVER** all **Special Education** services, including specialized programs like the Language-Based Learning Center and sub-separate Autism classrooms, in **appropriate, non-stigmatizing, and accessible environments.**

// **CREATE** flexible learning spaces to **support collaboration,** student presentations, and interdisciplinary units.

// **ENSURE** that all students have strong relationships with staff and their peers, so they **feel welcomed, included, and safe** in school.

// **ENHANCE** educational facilities to provide students with safe and **modern facilities that support innovative student learning.**

// **RESOLVE** overcrowding across elementary and middle school levels and address inequities between schools due to a lack of program space.

*\* Note: Edu. Plan was written for all grade configuration options (5-6, 4-6, or 5-8)*

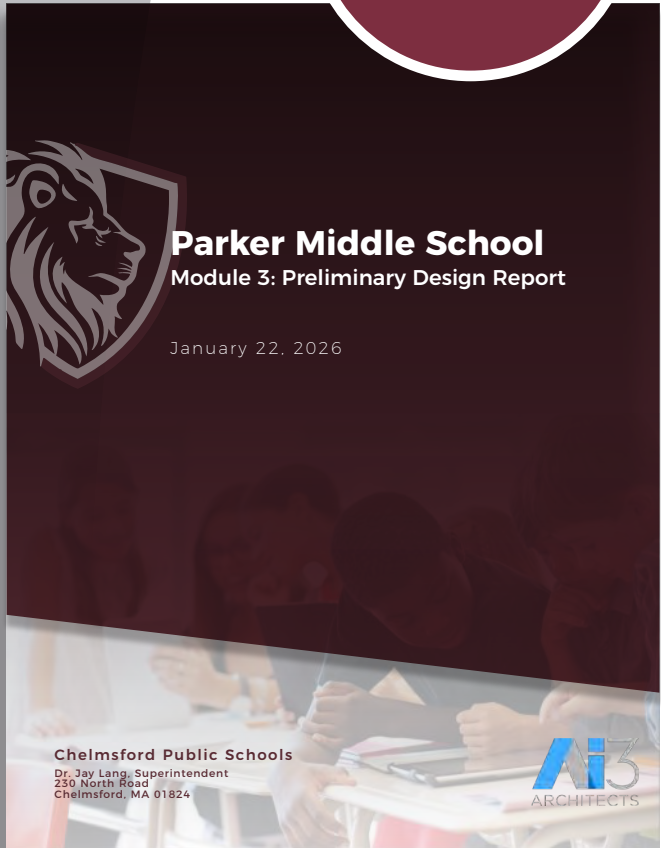


The **EXISTING** Parker building **INHIBITS** achieving these Ed Program aspects.

# Preliminary Design Program (PDP) Contents

The full report is anticipated to be completed by January 22, 2026

1,500+  
PAGES



**3.1.1 // INTRODUCTION**

- Project Overview
- Design Enrollment
- Capital Budget Statement
- Project Directory
- Project Schedule

**3.1.2 // EDUCATIONAL PROGRAM**

- Educational Profile Questionnaire
- Educational Process of Collaboration
- Educational Program

**3.1.3 // INITIAL SPACE SUMMARY**

- Space Summary Narrative
- Existing Floor Plans
- Space Summaries per Option
- Space Summary Template Deviation

**3.1.4 // EVALUATION OF EXISTING CONDITIONS**

**PARKER MIDDLE SCHOOL & MCCARTHY MIDDLE SCHOOL**

- Evaluation of Building Code Compliance
- Accessibility Evaluation
- Architectural Evaluation
- Structural Evaluation
- Electrical Evaluation
- Mechanical Evaluation
- Plumbing Evaluation
- Fire Protection Evaluation
- Technology Evaluation
- Evaluation of Energy Code Compliance
- Hazardous Materials Identification Study

**3.1.5 // SITE DEVELOPMENT REQUIREMENTS**

- Legal Title of Property
- Availability of Property for Development
- Development Restrictions Investigation

- Historic Relevance
- Site Analysis Narrative
- Site Utilities Narrative
- Site Permitting Narrative
- Site Aerial Survey
- Geotechnical Evaluation/Soils Analysis
- Phase I Environmental Site Assessment Report
- Traffic Impact Analysis
- Alternate Site Options

**3.1.6 // PRELIMINARY EVALUATION OF ALTERNATIVES**

- District Student Distribution Practices
- Tuition Agreements with Adjacent Districts
- Rental/Acquisition of Existing Buildings
- Summary of Conceptual Options
- Conceptual Cost Estimates
- Recommendations for Further Work

**3.1.7 // LOCAL ACTIONS & APPROVAL CERTIFICATION**

- Local Actions and Approvals Letter
- School Building Committee Agendas & Minutes
- School Committee Minutes
- Community Forum Presentation

**APPENDICES**

- Contents
- A** Statement of Interest
- B** MSBA Board Action Letters
  - B.1** Invitation to Conduct a Feasibility Study
  - B.2** Designer Selection Approval Letter
- C** Design Enrollment Certification Letter
- D** Phase I Traffic Impact Analysis
- E** Geotechnical Evaluation/Soils Analysis
- F** Phase I Environmental Site Assessment Report
- G** Wetlands Field Report



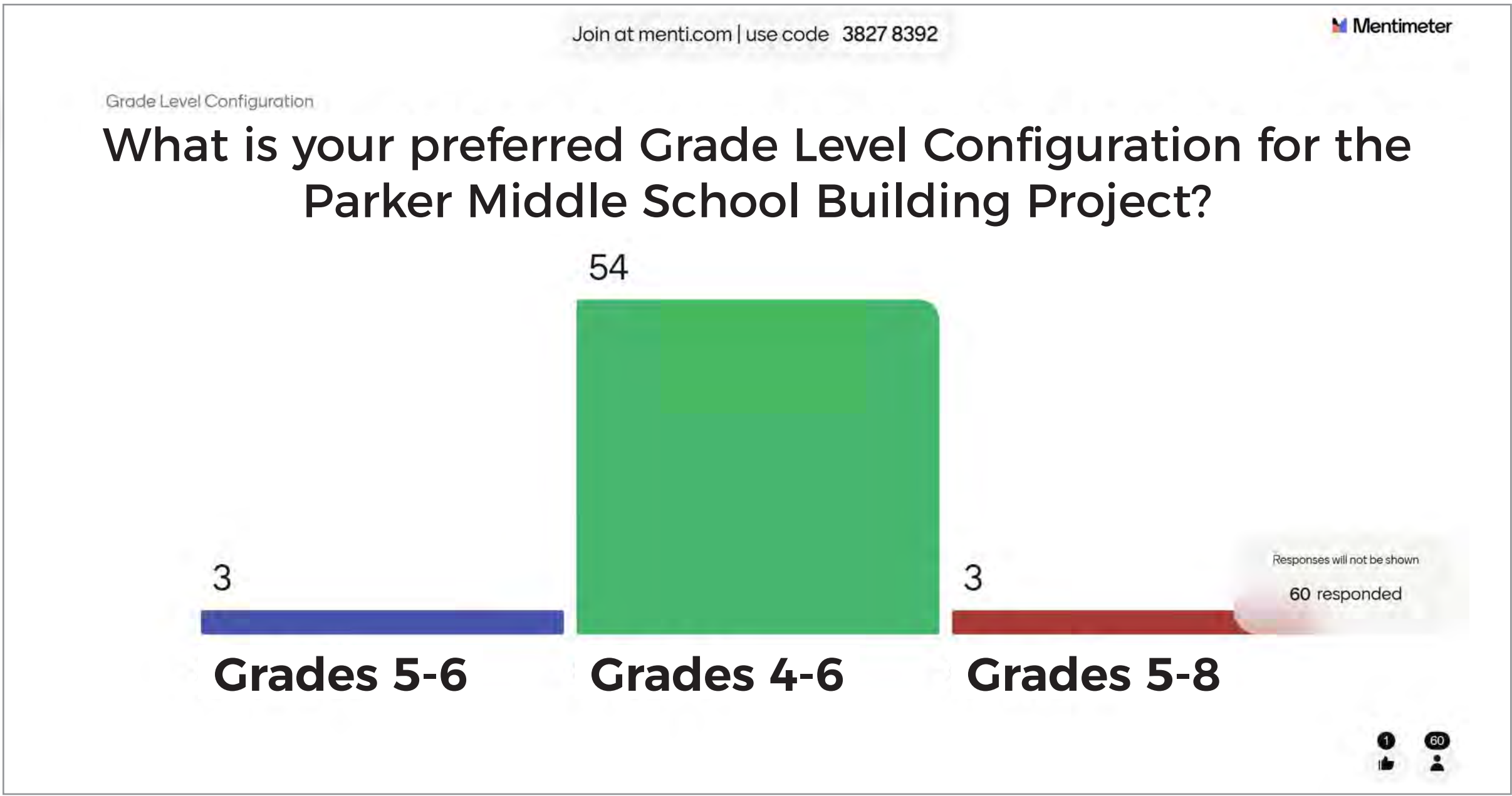
# Summary of Options for PDP Submission

| SITE A<br>(CURRENT PARKER MS SITE)                                                 |                |               |               |                |               |               | SITE B<br>(GRANITEVILLE FIELDS)                                                      |               |               | SITE C<br>(MCCARTHY MS FIELDS)                                                       |                    |               |
|------------------------------------------------------------------------------------|----------------|---------------|---------------|----------------|---------------|---------------|--------------------------------------------------------------------------------------|---------------|---------------|--------------------------------------------------------------------------------------|--------------------|---------------|
| X1<br>CODE                                                                         | A1<br>ADD/RENO |               |               | A2<br>NEW CON. |               |               | B1<br>NEW CON.                                                                       |               |               | X2<br>CODE                                                                           | C1<br>ADD          | NEW           |
| X1<br>(5-6)                                                                        | A1.1<br>(5-6)  | A1.2<br>(4-6) | A1.3<br>(5-8) | A2.1<br>(5-6)  | A2.2<br>(4-6) | A2.3<br>(5-8) | B1.1<br>(5-6)                                                                        | B1.2<br>(4-6) | B1.3<br>(5-8) | X2<br>(5-8)                                                                          | C1.3(a,b)<br>(5-8) | C2.3<br>(5-8) |
|  |                |               |               |                |               |               |  |               |               |  |                    |               |

# Virtual Poll: Grade Level Configuration

Results from Community Forum #3

Poll from  
12/17/25  
Community  
Forum





| Project Evaluation Matrix<br>(13 Total Options)<br><br>DOES THE OPTION...                                |                                                                                                          | SITE A<br>(CURRENT PARKER MS SITE) |                |               |               |                |               |               | SITE B<br>(GRANITEVILLE FIELDS) |               |               | SITE C<br>(MCCARTHY MS FIELDS) |                    |               |
|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|------------------------------------|----------------|---------------|---------------|----------------|---------------|---------------|---------------------------------|---------------|---------------|--------------------------------|--------------------|---------------|
|                                                                                                          |                                                                                                          | X1<br>CODE<br><br>X1<br>(5-6)      | A1<br>ADD/RENO |               |               | A2<br>NEW CON. |               |               | B1<br>NEW CON.                  |               |               | X2<br>CODE<br><br>X2<br>(5-8)  | C1                 |               |
|                                                                                                          |                                                                                                          |                                    | A1.1<br>(5-6)  | A1.2<br>(4-6) | A1.3<br>(5-8) | A2.1<br>(5-6)  | A2.2<br>(4-6) | A2.3<br>(5-8) | B1.1<br>(5-6)                   | B1.2<br>(4-6) | B1.3<br>(5-8) |                                | C1.3(a,b)<br>(5-8) | C2.3<br>(5-8) |
|                                                                                                          |                                                                                                          |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
| EDUCATIONAL PROGRAM<br>  | ...provide a sufficient <b>21<sup>st</sup> century</b> edu. environment?                                 |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...fulfill key aspects identified during <b>visioning</b> ?                                              |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...allow for team teaching and <b>collaboration</b> ?                                                    |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...include resources for <b>special education, ELL, and student support</b> ?                            |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...have connections to the <b>outdoors</b> ?                                                             |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...create <b>parity</b> across the district?                                                             |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
| COMMUNITY & ACCESS<br>   | ...optimize <b>community use</b> ?                                                                       |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ... <b>improve access</b> to the site?                                                                   |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...optimize <b>resources for community</b> use?                                                          |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...enhance <b>safety and security</b> on site?                                                           |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...Improve service/delivery/access & <b>operations</b> ?                                                 |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
| ENVIRONMENTAL IMPACT<br> | ...meet criteria outlined in the <b>site selection matrix</b> ?                                          |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...maintain <b>open space</b> for <b>recreational use</b> ?                                              |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...minimize the need for <b>additional field sites</b> ?                                                 |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...support the goals established in Chelmsford's <b>Climate Action Plan</b> ?                            |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          |                                                                                                          |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
| CONSTRUCT. PHASING<br> | ...require <b>phased-occupied</b> construction?                                                          |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ... <b>minimize impact</b> to <b>recreation fields</b> during construction?                              |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...allow for on <b>site parking</b> during construction?                                                 |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...include <b>adequate space</b> for construction staging?                                               |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...minimize <b>construction duration</b> ?                                                               |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
| ENERGY EFFICIENCY<br>  | ...provide the most <b>energy efficient solution</b> , thus minimizing long-term operating costs?        |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...provide the <b>best opportunity</b> for net-zero energy?                                              |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...align academic wings in the <b>most ideal</b> solar orientation?                                      |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
| COST<br>               | ...maximize the available <b>MSBA grant reimbursement</b> funding?                                       |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...maximize utility <b>rebates &amp; incentives</b> ?                                                    |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...satisfy the educational program and spatial requirements <b>cost effectively</b> (no excess)?         |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...satisfy the need for <b>50+ years</b> ?                                                               |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
|                                                                                                          | ...provide the highest potential <b>success</b> at both the <b>Town Meeting vote &amp; ballot vote</b> ? |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |
| TOTAL SCORE                                                                                              |                                                                                                          |                                    |                |               |               |                |               |               |                                 |               |               |                                |                    |               |

S B C T O C O M P L E T E  
B Y J A N . 1 5 , 2 0 2 6

# Anticipated Action Items

No school

School Committee

School Building Committee

MSBA Submission

Professional Team

| January |    |    |    |    |    |    |
|---------|----|----|----|----|----|----|
| S       | M  | T  | W  | T  | F  | S  |
|         |    |    |    | 1  | 2  | 3  |
| 4       | 5  | 6  | 7  | 8  | 9  | 10 |
| 11      | 12 | 13 | 14 | 15 | 16 | 17 |
| 18      | 19 | 20 | 21 | 22 | 23 | 24 |
| 25      | 26 | 27 | 28 | 29 | 30 | 31 |

- Jan. 6

SC Meeting

// Endorse Edu. Program
- Jan. 8

Ai3 Action Item

// Conceptual cost estimates returned
- Jan. 9-12

SBC Action Item

// Review cost estimates

// Receive Eval. Matrix
- Jan. 13-14

SBC Action Item

// Complete Eval. Matrix

// Send to Leftfield
- Jan. 15

SBC Mtg & Action Item

// Select Options for PSR

// Approve Submission
- Jan. 20

SC Meeting

// Confirm Enrollment Option(s) for PSR
- Jan. 22

PDP Submission to MSBA

| February |    |    |    |    |    |    |
|----------|----|----|----|----|----|----|
| S        | M  | T  | W  | T  | F  | S  |
| 1        | 2  | 3  | 4  | 5  | 6  | 7  |
| 8        | 9  | 10 | 11 | 12 | 13 | 14 |
| 15       | 16 | 17 | 18 | 19 | 20 | 21 |
| 22       | 23 | 24 | 25 | 26 | 27 | 28 |

- Feb. 2-25

Ai3 Action Items

// Continued development of PSR Options
- Feb. 12

Ai3 Action Items

// Likely to receive MSBA PDP review comments
- Feb. 26

Ai3 Action Items

// PDP review comments likely due back to MSBA
- Feb. 26

SBC Mtg

// Overview of PSR

// Update on Options

# Upcoming Events & Activities

## SBC Meeting

THURSDAY

**JAN 15,  
2026**

**Chelmsford Public  
Schools (230 North Rd)  
@ 6:00 pm**

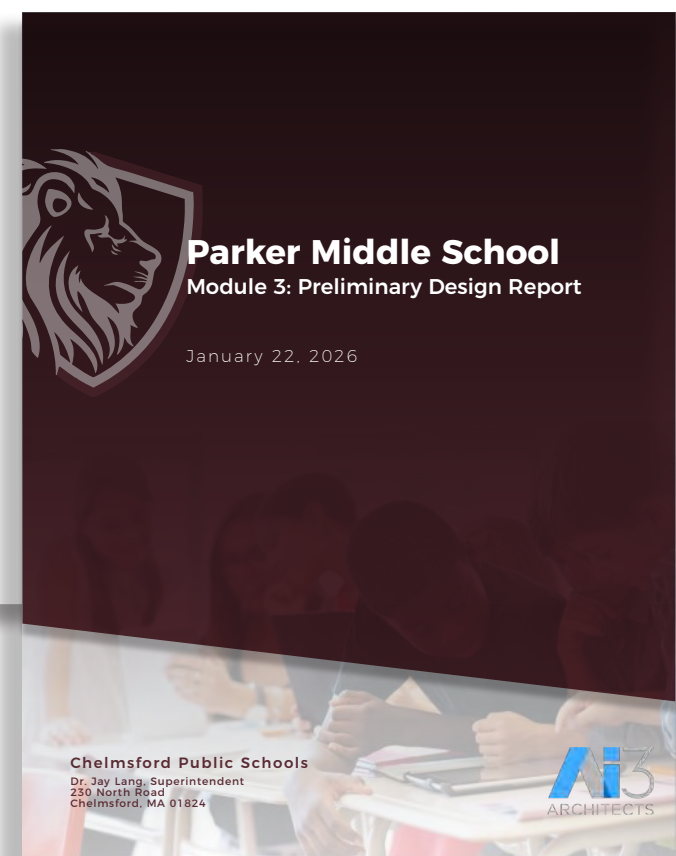
Reviews & approvals  
required for PDP  
Submission



## MSBA Submission

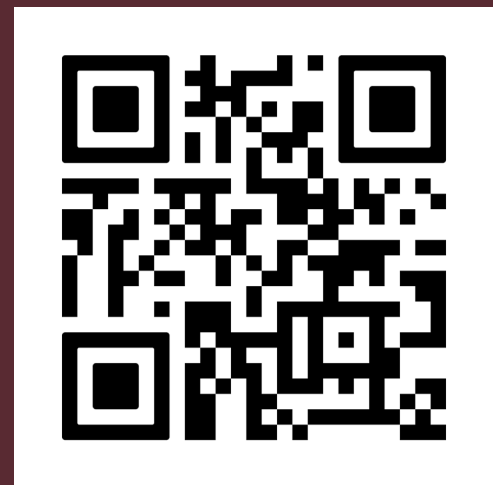
THURSDAY

**JAN 22,  
2026**



**STAY  
INFORMED**

**Parker School  
Building Project  
Website**







# Questions?

Thank you



# Chelmsford Public Schools

MODULE 3: PRELIMINARY DESIGN PROGRAM  
Massachusetts School Building Authority (MSBA)



# Parker Middle School Educational Program

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## MODULE 3: PRELIMINARY DESIGN PROGRAM

### Table of Contents

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# Parker Middle School Educational Program

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## Participants

The District completed three (3) visioning sessions with Consultant Michael Pirollo that included the following members of the school district: parents, community members, and local school board members:

| Name      |            | Title                                              |
|-----------|------------|----------------------------------------------------|
| Abbey     | Dick       | Department Coordinator - English                   |
| Alicia    | Cunningham | Center Elementary School Teacher - Grade 4         |
| Amanda    | Kellerman  | South Row Elementary School Teacher - Grade 4      |
| Amy       | Baker      | Parker Teacher - Grade 6 English/Social Studies    |
| Amy       | Matson     | Assistant Director of Student Support Services     |
| Amy       | Reese      | Director of Student Support Services               |
| Autumn    | Dolan      | Principal's Designee - Parker Middle School        |
| Bill      | Silver     | Director of Technology                             |
| Brian     | Curley     | Director of Facilities                             |
| Catherine | Burgess    | Byam Elementary School Teacher - Special Education |
| Channa    | Chinamasa  | Parker Student - Grade 6                           |
| Christy   | Whittlesey | Department Coordinator - Fine & Performing Arts    |
| Colleen   | Marino     | Parker Teacher - Grade 5 Math/Science              |
| Dennis    | King       | School Committee Member (Chair)                    |
| Donna     | Omobono    | Principal - Center Elementary School               |
| Eric      | Linsner    | Parker Teacher - Music (Band)                      |
| Indira    | Singam     | Parker Student - Grade 6                           |
| Jalisa    | Butler     | Parker Teacher - Special Education                 |
| Jason     | Fredette   | Principal - Byam Elementary School                 |
| Jay       | Lang       | Superintendent of Schools                          |
| Jayson    | Ramalho    | Assistant Principal - South Row Elementary School  |
| Jeffrey   | Long       | Parker Student - Grade 6                           |
| Jenn      | Hutchinson | Assistant Principal - Center Elementary School     |
| Jennie    | Oemig      | Communications & Media Director                    |
| Jennifer  | Clark      | Parker Teacher - Grade 5 Math/Science              |
| Jennifer  | Komperda   | Parker Teacher - Special Education                 |



## Parker Middle School Educational Program

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|           |             |                                                          |
|-----------|-------------|----------------------------------------------------------|
| Jon       | Morris      | Department Coordinator - Science                         |
| Joshua    | Blagg       | Principal - Parker Middle School                         |
| Kandace   | Boutin      | Byam Elementary School Teacher - Grade 4                 |
| Karyn     | Crouthamel  | Parker Parent                                            |
| Katherine | Richard     | Department Coordinator - Mathematics                     |
| Katie     | Simes       | Department Coordinator - Health & Physical Education     |
| Kelly     | Rogers      | Department Coordinator - ELL, Reading & Title I Services |
| Kristina  | Cote        | Harrington Elementary School Teacher - Grade 4           |
| Kyle      | Bean        | Parker Student - Grade 6                                 |
| Linda     | Hirsch      | Assistant Superintendent of Curriculum & Instruction     |
| Madeline  | Kowalik     | Parker Student - Grade 6                                 |
| Maria     | Santos      | School Committee Member (Vice Chair)                     |
| Marilyn   | Sweeney     | Department Coordinator - Technology                      |
| Mark      | Souza       | Assistant Principal - Parker Middle School               |
| Martha    | Robertson   | Parker Teacher - Music (Chorus)                          |
| Marybeth  | Macallister | Parker Teacher - Grade 5 English/Social Studies          |
| Maryellen | Olsson      | Parker Teacher - Grade 5 English/Social Studies          |
| Matthew   | Crouthamel  | Parker Parent                                            |
| Nancy     | Antolini    | Director of School Nutrition                             |
| Rob       | Asselin     | Principal - Harrington Elementary School                 |
| Robyn     | Adams       | Director of Community Education                          |
| Shannon   | Bischoff    | Department Coordinator - SEL and School Counseling       |
| Shannon   | Engel       | Parker Teacher - Grade 5 Math/Science                    |
| Shannon   | Semenza     | South Row Elementary School Teacher - Grade 4            |
| Stacey    | Mulholland  | Parker Parent                                            |
| Stephanie | Quinn       | Department Coordinator - Social Studies                  |
| Tracey    | Cody        | Parker Teacher - Grade 6 English/Social Studies          |



# Parker Middle School Educational Program

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## INTRODUCTION

### **Vision Statement**

The vision of the Chelmsford Public Schools is to provide all students with multiple pathways to optimize their own potential for academic excellence, leadership, and social and emotional wellness. We work from a rigorous curriculum that is aligned with state standards, using multiple forms of data to inform innovative approaches to teaching. Our students' success is anchored in the high expectations of teachers who are part of a professional, collaborative culture that demands a continuous focus on instructional improvement. It is our responsibility that every student feels safe, cared for, appropriately challenged, and supported in our schools. Our students' successes are celebrated within and across schools as well as throughout the broader community. Parents and the Chelmsford community are connected to the daily life of our schools through consistent, multidirectional, and multi-modal communication, which builds external support for and pride in the district, schools, teachers, and students. As a result of high-quality teaching, meaningful partnerships, and well-resourced schools, our students contribute to the Chelmsford community as self-directed, creative, and well-rounded learners who are ready to become the innovative leaders of tomorrow.

### **District Mission Statement**

The mission of the Chelmsford Public Schools is to educate, engage, prepare, and empower well-rounded and knowledgeable learners who PERSEVERE through challenges, demonstrate RESPECT and INTEGRITY in their words and actions, are DEDICATED to their community, and display EMPATHY as global citizens while discovering and pursuing their full potential.

### **Educational Philosophy**

The teaching philosophy in Chelmsford Public Schools (CPS) emphasizes rigorous academic opportunities while prioritizing the durable skills needed to deepen learning, increase personal impact on society, and prepare students for college and careers. The instructional approach seeks to move toward the pedagogy necessary to implement current curriculum standards, which include project-based learning, hands-on instruction, interdisciplinary connections (STEAM), and collaborative work. The existing instructional program relies on the delivery of curriculum materials aligned with DESE curriculum frameworks and regulations. However, facility limitations currently prevent the full implementation of modern, required pedagogy, such as extensive use of technology, innovative STEM-focused maker spaces/breakout spaces, modern science labs, and small group instructional workspaces.

### **Chelmsford's Theory of Action**

Chelmsford Public School's Theory of Action reflects our core beliefs about what will lead to long-term success for our students, families, community, and staff.





## Parker Middle School Educational Program

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If...

- District leaders provide direction, rigorous curriculum, appropriate resources, and ongoing development, and
- Principals create the conditions, the culture, and build buy-in to ensure initiatives are implemented faithfully in a welcoming environment, and
- Teachers foster an inclusive learning environment, ensure curriculum is accessible to each and every student, and build strong relationships with students and families

Then...

- We will realize our vision that every student will reach their full academic potential, feel confident in themselves and their abilities, and grow into strong community members and citizens.

### **Parker Middle School Vision**

The Chelmsford Public Schools (CPS) is committed to providing a learning environment that aligns with the District's strategic plan (2022-2027). The plan aimed to resolve key district issues, including overcrowding, inequities between schools due to a lack of program space, and aging facilities, while supporting continued enrollment growth. The educational vision for the Parker Middle School project is to create a modern facility that supports 21st-century learning, fosters collaborative problem-solving and creativity, and provides comprehensive, safe, and equitable educational experiences for all students and staff.

### **Curriculum Goals and Objectives**

The core academic curriculum for Grades 5 & 6 includes Mathematics, English Language Arts, Science, and Social Studies. Additionally, the school offers Art, Music (band, orchestra, and chorus), Physical Education, Health, Technology, and library as "specials." Key objectives for the curriculum moving forward include:

- Providing a full range of programs consistent with state and approved local requirements, currently limited by facility constraints.
- Integrating STEM/STEAM and maker space activities into the curriculum, currently restricted by a lack of space.
- Ensuring ample and appropriate spaces for differentiated instruction, small group work, and Tier II academic interventions, which are currently severely lacking.
- Delivering all Special Education services, including specialized programs like the inclusive Language-Based and STRIVE (behavioral/therapeutic) Programs, and sub-separate programs like the Autism and Lifeskills Programs, in appropriate, non-stigmatizing, and accessible environments.
- Creating flexible learning spaces to support student and teacher collaboration, student presentations, and interdisciplinary units.





# Parker Middle School Educational Program

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## **Chelmsford Priority Areas and Initiatives**

Using our Theory of Action as a guide, Chelmsford Public Schools identified five priority areas to direct our efforts and resources over five years as outlined in the District's strategic plan (2022-2027). This will allow us to achieve our district mission and vision, to address any obstacles that arise, and enable our district to utilize our energy and resources with greater alignment.

### **Priority Area 1: Academic Achievement**

- The district will focus on mathematical achievement, particularly in elementary and middle grades (K-8), to build a strong foundation for academic success in high school and beyond.

Chelmsford Public Schools believes that high-quality academic instruction must remain at the forefront of our efforts to support each and every student in Chelmsford. We will achieve this by focusing on building foundational skills in math, where Chelmsford student achievement has lagged behind reading, and by continuing to support reading instruction in order to support academic success across subjects.

#### **How we measure our success**

1. Percent of students making adequate annual growth (student growth percentiles based on MCAS).
2. Percent of 3rd-graders meeting standards in reading based on i-Ready diagnostic results.
3. Percent of 3rd-graders meeting standards in math based on i-Ready diagnostic results.
4. Percent of 8th-graders meeting standards in math based on i-Ready diagnostic results.

### **Priority Area 2: Equity**

- The district will focus on providing equitable opportunities for each and every student to close achievement gaps between marginalized student populations and their peers.

Chelmsford students represent a wide variety of identities, backgrounds, and experiences. We will focus on making sure that each and every student is given the opportunity to succeed and thrive in Chelmsford Public Schools and that our increasing diversity becomes a strength of our district.

#### **How we measure our success**

1. Achievement gap between general education and students with IEPs.
2. Achievement gap between general education and students who are economically disadvantaged.



# Parker Middle School Educational Program

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## **Priority Area 3: Social-Emotional Learning**

- The district will focus on ensuring students have strong relationships with staff and their peers, so students feel welcomed, included, and safe in school.

Chelmsford Public Schools knows that ensuring students feel safe and welcomed in their learning environment is critical for supporting student engagement and learning. We will closely track these efforts to nurture the whole child in order to make sure each and every student feels a sense of belonging in our district.

### **How we measure our success**

1. Percent of students who report feeling a sense of belonging in school across grades K-12.
2. Percent of students who report having positive relationships with peers across grades K-12.
3. Percent of students who report having positive relationships with staff across grades K-12.

## **Priority Area 4: Human Capital and Staff**

- The district will focus on attracting and developing a highly effective teaching staff equipped to meet the diverse needs of our student population.

The teachers and staff in Chelmsford Public Schools are one of our greatest strengths, and supporting and developing this group will remain a top priority. We will continue to provide opportunities for professional development while also ensuring that our staff is equipped to meet the needs of each and every student in Chelmsford.

### **How we measure our success**

1. Increase the number of adults from diverse backgrounds working with students, including support personnel and college partners, to reflect the diversity of our student population.
2. Percent of instructional staff who receive professional development and training and indicate that they feel adequately prepared to differentiate for diverse student populations.
3. Percent of staff who report feeling equipped to provide culturally responsive instruction.

## **Priority Area 5: Operations and Facilities**

- The district will enhance educational facilities to provide students with safe and modern facilities that support innovative student learning.

Students and teachers thrive when their learning environments are clean, modern, and welcoming. We will focus on providing buildings and facilities that reflect the high-quality



# Parker Middle School Educational Program

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education that takes place inside them, and we will continue to explore new ways to deliver innovative learning experiences for our students.

## How we measure our success

1. Annual review of short-term capital plans (to determine what priority areas have been completed), and if the district was early/late/on-time and over/under budget.
2. Annual review of maintenance work orders submitted and completed.
3. Annual review of building conditions for the APPA standard of cleaning.

## GRADE & SCHOOL CONFIGURATION POLICIES

### *Current*

The Chelmsford Public School District provides educational programs for students in preschool through age 22. As of October 1, 2025, there were 5,128 students enrolled in the eight (8) schools. Chelmsford Public Schools operates:

- One (1) integrated preschool - Chelmsford Integrated Preschool (CHIPS)
- Four (4) elementary schools - grades kindergarten (K) through four (4)
- Two (2) middle schools - One school grades five (5) through six (6), and one (1) school grades seven (7) through eight (8)
- One (1) high school - grades nine (9) through twelve (12)

Chelmsford Public Schools has historically participated in School Choice for high school only.

Parker Middle School currently serves all Chelmsford students in grades 5 and 6. The school is generally organized into sixteen (16) strands with two-person teacher teams per grade level for a total of 32 core academic teachers. This year (2025-2026), grade 5 has an extra 2-person teacher team to accommodate increased enrollment; the extra or “bubble” team follows the grade 5 schedule. One teacher on each team is responsible for instructing approximately 50 students (2 sections of 25) in English Language Arts (ELA) and social studies, while the other teacher is responsible for instructing the same 50 students (2 sections of 25) in mathematics and science. Students also attend specialist classes in art, music, physical education, health, library, and computers (technology).

Prior to the 2023-2024 school year, Chelmsford operated two (2) grade 5-8 middle schools (Parker and McCarthy). Parker Middle School primarily enrolled students from Byam and Harrington Elementary Schools, and McCarthy Middle School primarily enrolled students from Center and South Row Elementary Schools. To begin to address identified enrollment inequities between Parker and McCarthy Middle Schools, the District shifted to make Parker Middle School a townwide grades 5 and 6 school and McCarthy Middle School a townwide grades 7 and 8 school. The 2025-2026 school year is our third year in this new enrollment configuration. The



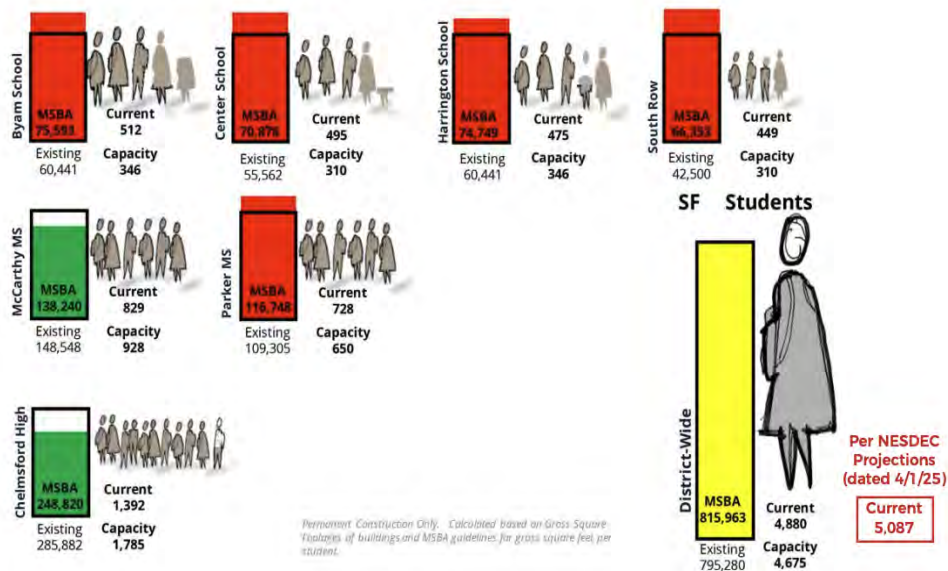
## Parker Middle School Educational Program

current Grade 5 and 6 grade level configuration at Parker Middle School remains structurally over capacity by 43 students this year in grade 5 and required the District to add an additional two-person teaching team to that grade level for the 2025-2026 school year.

Parker Middle School is beyond maximum capacity both inside the classrooms and with small group instruction and special education services delivered in hallway areas, converted storage areas, and within larger spaces such as our current library. Other services, like our English language learner (ELL) classes, are provided in converted classroom areas connected to the cafeteria, where the noise level is not ideal for instruction. Our specialist classes in music are creatively scheduled and use additional areas such as the back of the stage, in a shared space in the cafeteria. The current gymnasium is beyond capacity with upwards of three (3) classes at a time scheduled in the space, and classes are forced to use additional areas of the school and outside when available.

The district underwent a facilities review process in 2021, where it was determined that Parker Middle School and other schools within the district were already over capacity based on MSBA's current standards. Additionally, Parker Middle School facilities were currently reviewed using the MSBA spacing guidelines.

### Recap of Capacity Analysis (2021) Informed the Enrollment Options for Consideration





# Parker Middle School Educational Program

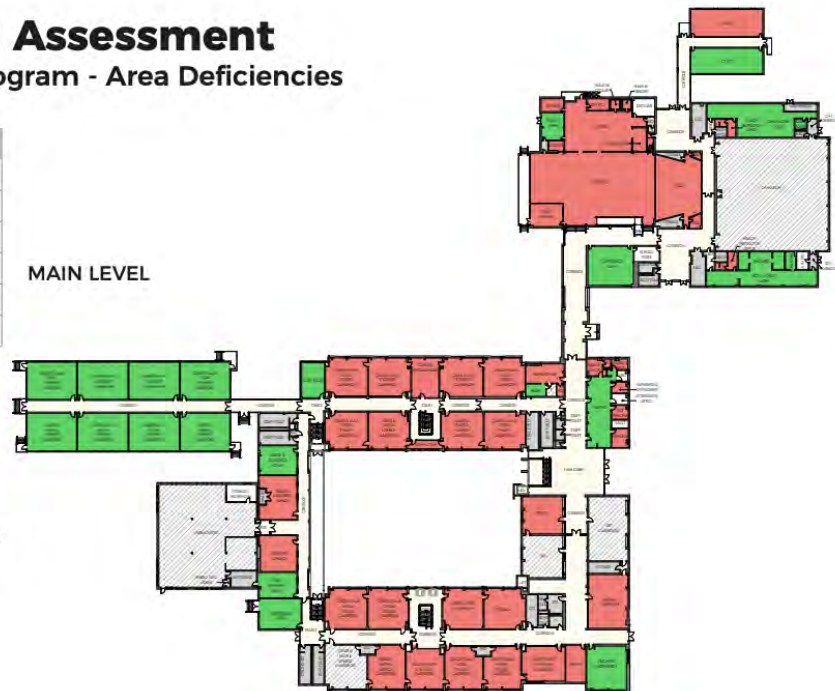
## Existing Spatial Assessment

### Parker Middle School Program - Area Deficiencies

| SIZE COMPARISON LEGEND             |  |
|------------------------------------|--|
| >5% Less than MSBA Guidelines      |  |
| <5% Greater than MSBA Guidelines   |  |
| Acceptable per MSBA Guidelines     |  |
| Circulation                        |  |
| Space Accounted in Grossing Factor |  |
| Not included in MSBA Guidelines    |  |

Deficiencies per MSBA Space Summary Guidelines

The majority of learning spaces are **undersized** per the MSBA Guidelines



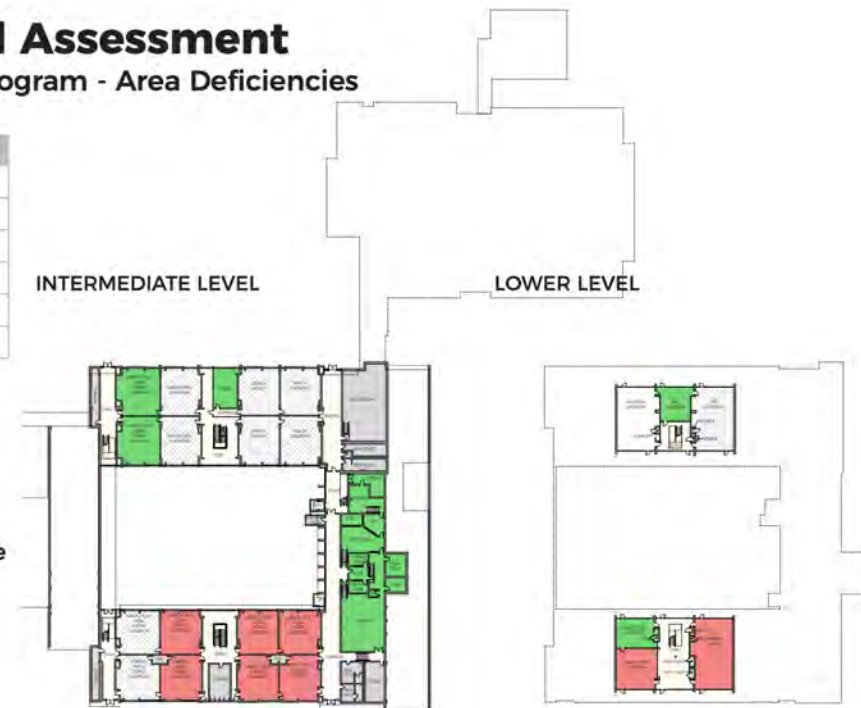
## Existing Spatial Assessment

### Parker Middle School Program - Area Deficiencies

| SIZE COMPARISON LEGEND             |  |
|------------------------------------|--|
| >5% Less than MSBA Guidelines      |  |
| <5% Greater than MSBA Guidelines   |  |
| Acceptable per MSBA Guidelines     |  |
| Circulation                        |  |
| Space Accounted in Grossing Factor |  |
| Not included in MSBA Guidelines    |  |

Deficiencies per MSBA Space Summary Guidelines

The majority of learning spaces are **undersized** per the MSBA Guidelines





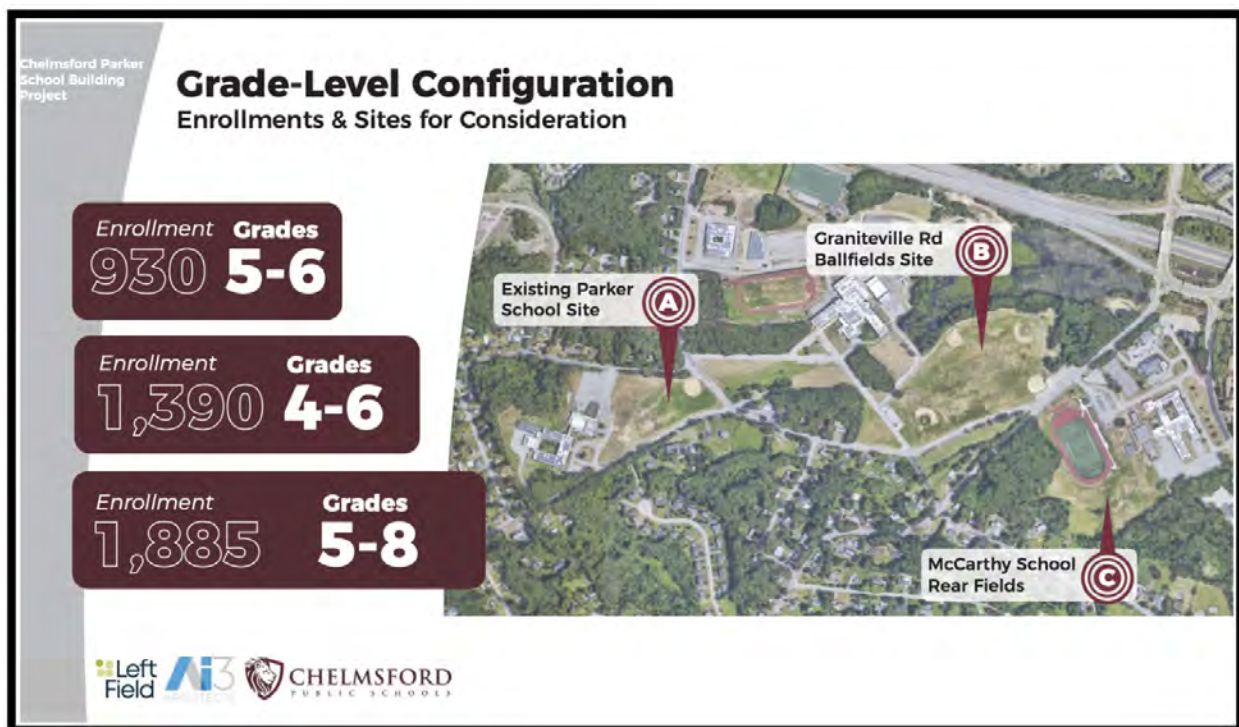


# Parker Middle School Educational Program

## ***Proposed***

The District's facilities plan (dated 1/28/2022) studied enrollment projections and facility capacity to resolve overcrowding across elementary and middle school levels. The Chelmsford Public Schools desire to explore several options with the MSBA:

1. Grade Level Configuration (5-6): A new Parker Middle School large enough to accommodate all Grade 5 and 6 students in the district.
2. Grade Level Reconfiguration (4-6): A new Parker Middle School large enough to accommodate all Grade 4 through 6 students in the district.
3. Grade Level Reconfiguration (5-8): A new Parker Middle School large enough to accommodate all Grade 5 through 8 students in the district.



## ***Advantages***

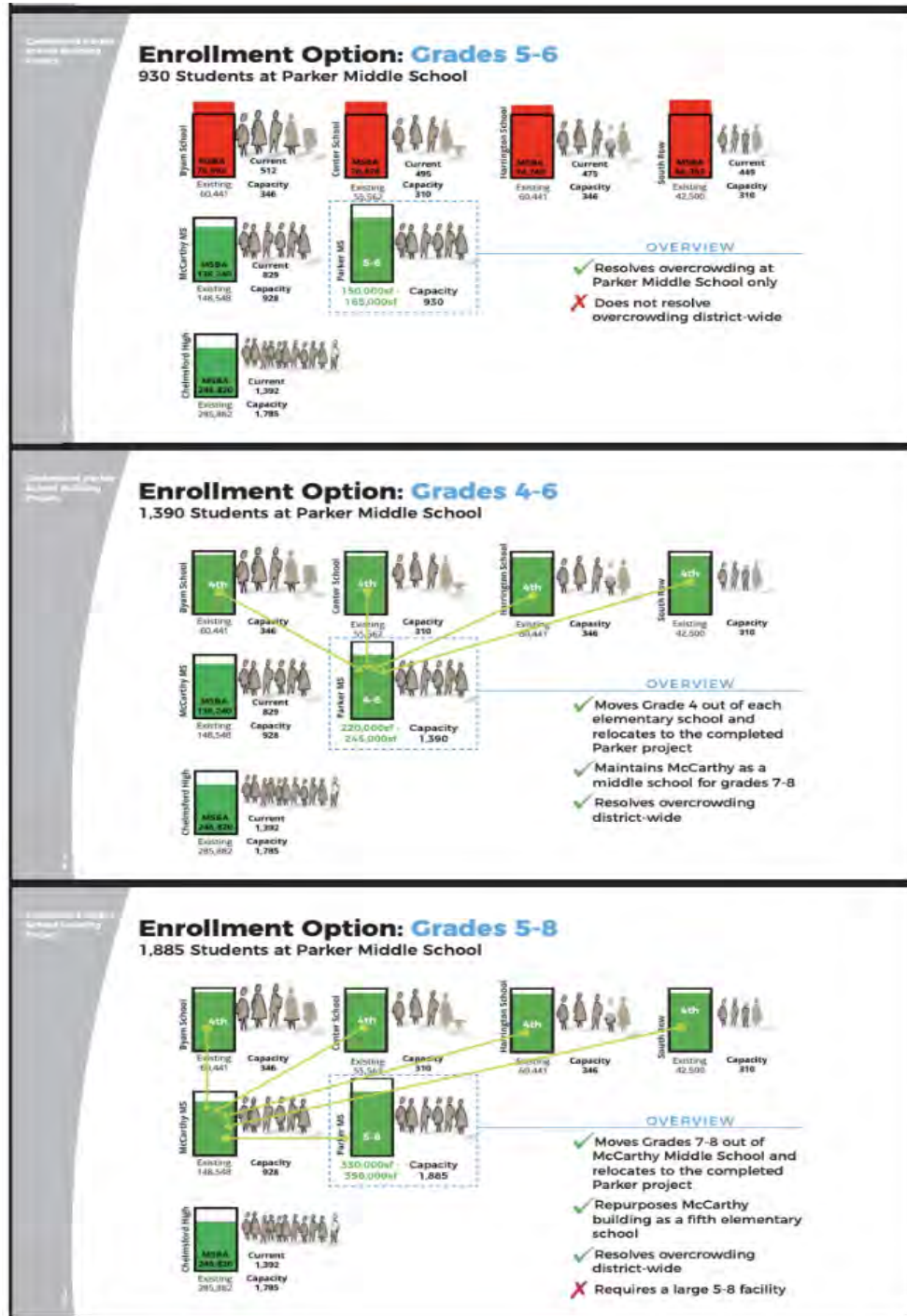
The primary advantage of addressing the Parker facility is resolving existing overcrowding (current and projected) and addressing inequities between middle schools due to a lack of program space. The projected student enrollment increase of 171 students at Parker Middle School (as currently configured as grade 5-6) over the next ten years further exacerbates the existing overcrowding condition.

- **Addressing Overcrowding and Space Constraints:** The 4-6 and 5-8 grade level reconfigurations alleviate overcrowding across the district, even at the elementary level.
- **Equitable Class Sizes and Programs:** A new building, regardless of the ultimate grade level configuration chosen, would provide appropriate capacity, eliminating the reliance



# Parker Middle School Educational Program

on ten (10) modular classrooms past their useful life and allowing for equitable programs not currently available due to facility constraints.



## Facilitating Transitions

Any reconfiguration that requires students and staff to be reassigned between schools will be planned accordingly and ideally starting two years ahead of the planned transition. During the





# Parker Middle School Educational Program

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school year prior to the transition, we will plan activities that bring together the groups of staff and students who will be assigned to the same building for culture-building activities. Our academic curriculum is aligned between the buildings, which will ease the transition, along with our shared core values. Additionally, we would provide sessions for families to learn more about the transition and to allow for “meet and greets” between families and staff for the new building. We have documented experience and success in facilitating transitions and cite the planning and implementation of the 2023-2024 Parker and McCarthy Middle School grade level reconfiguration as an example of the type of community, family and staff involvement that will occur in any reconfiguration involving the ultimate Parker facility.

## CLASS SIZE POLICIES

### *Current*

The Chelmsford School Committee [Policy IIB – Class Size](#) adheres to the following guidelines:

- Grades K-1: 22 students
- Grades 2-4: 25 students
- Grades 5-8: 25 students
- Grades 9-12: 25 students

The current student-to-teacher ratio at Parker Middle School is 25 students per teacher, which is within the current School Committee Guideline of 25 students per teacher. This exceeds the planned ratio of 22 students per teacher, as smaller class sizes are required as 53% of the classrooms at Parker Middle School are more than 10% under the minimum MSBA classroom size guidelines.

### *Proposed*

The District intends to adhere to the Chelmsford School Committee class size guideline of 25 students in Grades 4-8. The rationale for a new building is to provide appropriately sized educational spaces to safely accommodate these current class sizes (25 students per teacher) and projected enrollment increases. Currently, all general education classrooms are under the MSBA minimum size guidelines, which interferes with providing best instructional practices, including collaboration spaces, and is particularly hazardous in science classrooms where students require additional space to perform work safely.

## SCHOOL SCHEDULING METHOD

### *Current*

At this time, students in grades 5 and 6 attend English Language Arts, mathematics, science, social studies, art, music, physical education, health, computer (technology), and library classes instructed by licensed teachers. Half of each grade level attends “specials” at the same time. There is a block each day where the entire grade level attends specials at the same time to



## Parker Middle School Educational Program

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facilitate and support common planning for cross-curricular activities and also to provide a basis for consistent review of data and shared planning for instruction. This year (2025-2026), grade 5 has an extra 2-person teacher team to accommodate increased enrollment; the extra or “bubble” team follows the grade 5 schedule.

The school schedule is revisited annually by the principal and his/her school-based team. Adjustments are made based upon enrollment, student and programming needs, staffing levels, and contractual agreements, allowing for planning time and lunch.

The student day runs from 8:20 a.m. to 2:40 p.m. Parker Middle School has a daily academic schedule that allows for 72 minutes of English Language Arts, 72 minutes of mathematics, 45 minutes of science and social studies, and a weekly 45-minute SEL/WINN (What I Need Now) block (Wednesdays), which allows for SEL lessons using the *Second Step* curriculum and a Multi-Tiered Systems of Support model. Based upon the MTSS model, students receive targeted assistance in English Language Arts and/or mathematics during this period when they need additional support, extra practice, clarification, or enrichment. All grade 5 and 6 students have a daily 40-minute lunch and recess block, along with a 50-minute art, music, physical education, health, computer (technology), and library class weekly.

Parker Middle School currently operates schedules that necessitate four (4) lunch seatings per day due to cafeteria size. Because students must move through classrooms on the lower level of the school (due to the lack of a central corridor), students must operate on individual grade-level schedules. This configuration limits scheduling flexibility for specialist classes. Transition times require students to cut through classrooms that are in session, creating disruptions to learning. To host large group assemblies, scheduling must occur outside the normal lunch periods (before 10:15 a.m. or after 1:45 p.m.), often requiring specialized programs to be scheduled over several school days due to space constraints using the cafeteria/gymnasium.



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| PERIODS                                                          | Team 5A<br>Explorers            | Team 5B<br>Voyagers              | Team 5C<br>Navigators           | Team 5D<br>Innovators            | Team 5E (Extra)<br>Innovators    | Team 6A<br>Entrepreneurs         | Team 6B<br>Engineers            | Team 6C<br>Inventors            | Team 6D<br>Architects             |
|------------------------------------------------------------------|---------------------------------|----------------------------------|---------------------------------|----------------------------------|----------------------------------|----------------------------------|---------------------------------|---------------------------------|-----------------------------------|
| HR/1                                                             | 8:20-8:25                       | 8:20-8:25                        | 8:20-8:25                       | 8:20-8:25                        | 8:20-8:25                        | 8:20-8:25                        | 8:20-8:25                       | 8:20-8:25                       | 8:20-8:25                         |
| 2                                                                | CORE<br>8:28-9:40               | CORE<br>8:28-9:40                | CORE<br>8:28-9:40               | CORE<br>8:28-9:40                | CORE<br>8:28-9:40                | SPECIALS<br>8:28-9:10            | PERFORMING<br>8:28-9:10<br>ARTS | PERFORMING<br>8:28-9:10<br>ARTS | SPECIALS<br>8:28-9:10             |
| 3                                                                | SPECIALS<br>9:43-10:25          | PERFORMING<br>9:43-10:25<br>ARTS | SPECIALS<br>9:43-10:25          | PERFORMING<br>9:43-10:25<br>ARTS | PERFORMING<br>9:43-10:25<br>ARTS | CORE<br>9:13-10:23               | CORE<br>9:13-10:23              | CORE<br>9:13-10:23              | CORE<br>9:13-10:23                |
| 4                                                                | CORE<br>10:28-11:38             | CORE<br>10:28-11:38              | CORE<br>10:28-11:10             | CORE<br>10:28-11:10              | CORE<br>10:28-11:10              | LUNCH<br>10:25-11:05             | LUNCH<br>10:25-11:05            | SPECIALS<br>10:25-11:07         | PERFORMING<br>10:25-11:07<br>ARTS |
| 5                                                                | LUNCH<br>11:40 - 12:20          | LUNCH<br>11:40 - 12:20           | LUNCH<br>11:13-11:53            | LUNCH<br>11:13-11:53             | LUNCH<br>11:13-11:53             | CORE<br>11:08-12:20              | CORE<br>11:08-12:20             | CORE<br>11:10 - 12:23           | CORE<br>11:10 - 12:23             |
| 6                                                                | CORE<br>12:23-1:05              | CORE<br>12:23-1:05               | CORE<br>11:56-1:05              | CORE<br>11:56-1:05               | CORE<br>11:56-1:05               | PERFORMING<br>12:23-1:08<br>ARTS | SPECIALS<br>12:23-1:08          | LUNCH<br>12:25-1:05             | LUNCH<br>12:25-1:05               |
| 7                                                                | PERFORMING<br>1:08-1:53<br>ARTS | SPECIALS<br>1:08-1:53            | CORE<br>1:08-1:53               | CORE<br>1:08-1:53                | CORE<br>1:08-1:53                | CORE<br>1:10-1:55                | CORE<br>1:10-1:55               | CORE<br>1:08-1:53               | CORE<br>1:08-1:53                 |
| 8                                                                | CORE<br>1:55-2:40               | CORE<br>1:55-2:40                | PERFORMING<br>1:55-2:40<br>ARTS | SPECIALS<br>1:55-2:40            | SPECIALS<br>1:55-2:40            | CORE<br>1:58-2:40                | CORE<br>1:58-2:40               | CORE<br>1:55-2:40               | CORE<br>1:55-2:40                 |
| PERFORMING ARTS: ART, BAND, CHORUS, ORCHESTRA & LITERACY SUPPORT |                                 |                                  |                                 |                                  |                                  |                                  |                                 |                                 |                                   |
| SPECIALS: COMPUTER, LIBRARY, HEALTH, PHYS, ED                    |                                 |                                  |                                 |                                  |                                  |                                  |                                 |                                 |                                   |

The new facility must support a modern scheduling method based on a team approach (neighborhood model). This would allow for consistent teacher common planning time (CPT). Eliminating the need for students to navigate through active classrooms will significantly improve the learning environment.

## Proposed Changes and Associated Rationale

In each of the three grade level options being considered, the core academic programming will remain very similar in terms of instructional time (minutes). While the time allotment for specialized subjects may be adjusted, the scheduling methodology itself will remain a collaborative process and prioritize the creation of common planning time. Other factors under consideration include:

- **Optimizing Core Instruction:** A new layout, supported by a central corridor and grade-level neighborhoods, including sufficient intervention space, will remove the current disruptions caused by students cutting through classrooms.
- **Reduce Lunch Seatings:** Designing a cafeteria large enough to reduce the number of lunch seatings, potentially to two or three, similar to exemplar models.
- **Specialist/Program Integration:** Developing a schedule that allows special courses (i.e. art, music, computer) to be delivered consistently and without disruption, either in dedicated spaces or by minimizing teacher travel time. For example, the use of a new, separate performance space would eliminate the need to use the back of the stage as a classroom and disrupt instructional time due to conflicting space needs.



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- **Reconfiguration of Current Specialist Offerings:** Additionally, to reduce redundancy and allow for an alternative specialist offering, the visioning teams are reviewing the overlap of the current library and computer (technology) classes to redesign one course in media studies, which would allow for another specialist choice for students, such as STEM (PLTW).

## METHODOLOGIES AND STRUCTURE

### Administrative and Academic Organization

#### *Current*

Parker Middle School serves grade 5 and 6 students in seventeen (17) strands, which are organized into two-person teacher teams per grade level - nine (9) two-person teams in grade 5 and eight (8) two-person teams in grade 6 serve Parker's current 814 students. This year (2025-2026), grade 5 has an extra 2-person teacher team to accommodate increased enrollment; the extra or "bubble" team follows the grade 5 schedule. One teacher on the team is responsible for instructing English Language Arts and social studies, and the other teacher on the team is responsible for teaching mathematics and science. There is one (1) principal, one (1) assistant principal, and one (1) supervisor of students. The school implements a team structure, however the building, originally designed and constructed in 1965 for a departmental model, does not physically support a team or "neighborhood" organization successfully. There is a varied model of push-in and pull-out services for academic, intervention, and social-emotional supports. Pull-out services occur in a variety of non-classroom spaces, including repurposed classrooms, hallways, and closets.

Teaching methodologies are limited by the structure and adjacencies of spaces in the building. All schools in the district were designed with a traditional teaching and learning model in mind, with no flexible or collaborative spaces where students can work on hands-on projects or interact in smaller groups with locations that support student choice when learning. Grade level teams are separated by hallways and even at times are located on separate floors because adequate space is lacking for neighborhoods with shared learning spaces among grade level teams. This lack of flexibility limits the opportunity to integrate classrooms, programs, collaboration, and intervention during the school day.

In addition to these four core subjects, which meet every day, our middle schoolers are provided with rigorous specialist offerings scheduled on a rotating basis each week intended to support the education of the whole child and provide them with a broad range of educational experiences that are representative of the world we live in. Currently, the following courses are offered through our specialist rotation: Performing Arts (Band, Chorus, Orchestra, and General Music), Visual Arts, Physical Education, Health, Computers (Technology), and Library. Some of the specialist classes are being instructed in spaces not intended for their discipline, affecting the quality of instruction and student engagement. Additionally, the currently designated spaces are not large



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enough to accommodate the current or future number of students enrolled, therefore instruction is limited within those spaces.

### ***Proposed***

The District proposes transitioning to a facility that fully supports the middle school teaming structure by creating grade level academic neighborhoods. This organization fosters a small school atmosphere within a large school setting, encouraging personalized learning, social-emotional support, and interdepartmental collaboration. The new design should consider teaming/neighborhood concepts that foster large group, small group, and individual learning experiences; support interdisciplinary instruction; and include spatial adjacencies such as adult workspaces, storage, collaborative breakout spaces, and outdoor learning. The neighborhood model must integrate special education support services and classrooms within the grade-level neighborhood area to maximize inclusion.

We are currently reviewing our teacher team structures for the grade 4-6 configuration to ensure we have structured the instructional practices that are developmentally appropriate for the addition of grade 4 students in a new grade 4-6 building. At the present time, grade 4 students are instructed by one teacher delivering all four primary academic subjects - English Language Arts, mathematics, science, and social studies. Whether grade 4 remains with one teacher instructing all four primary academic subjects or transitions to a two-teacher team as is in place with grades 5 and 6, the required number of core academic classroom spaces within the building would not be impacted.

Students would greatly benefit from implementing learning neighborhoods for each grade level. These dedicated spaces foster collaboration and hands-on learning opportunities beyond the traditional classroom setting. This model fosters bringing students from different classrooms within a grade level together. Students can work on project-based learning activities, engage in peer-to-peer learning, and develop important social skills. For example, teachers can combine classes and while one teacher is in the classroom working on reteaching a specific standard, the other teacher could be extending the learning with students working on speaking and listening skills through a performance. Additionally, a neighborhood structure supports and provides an ideal setting for the delivery of specialized instruction from special education staff, mathematics and reading interventionists. Extended learning spaces within the neighborhoods allows for small-group instruction and individualized student attention. Further, special area teachers, such as art, music, STEAM, health/wellness, and library media, can host engaging events, provide presentations, and integrate content across the core academic curriculum areas in these spaces.

A neighborhood model design would allow teaching teams to host larger events, including author visits, musicals, curriculum nights, and student work showcases, which would provide for larger community connections within the grade level(s) and between school and home. Unlike traditional school design, the larger learning spaces create a smaller “home base” that minimizes



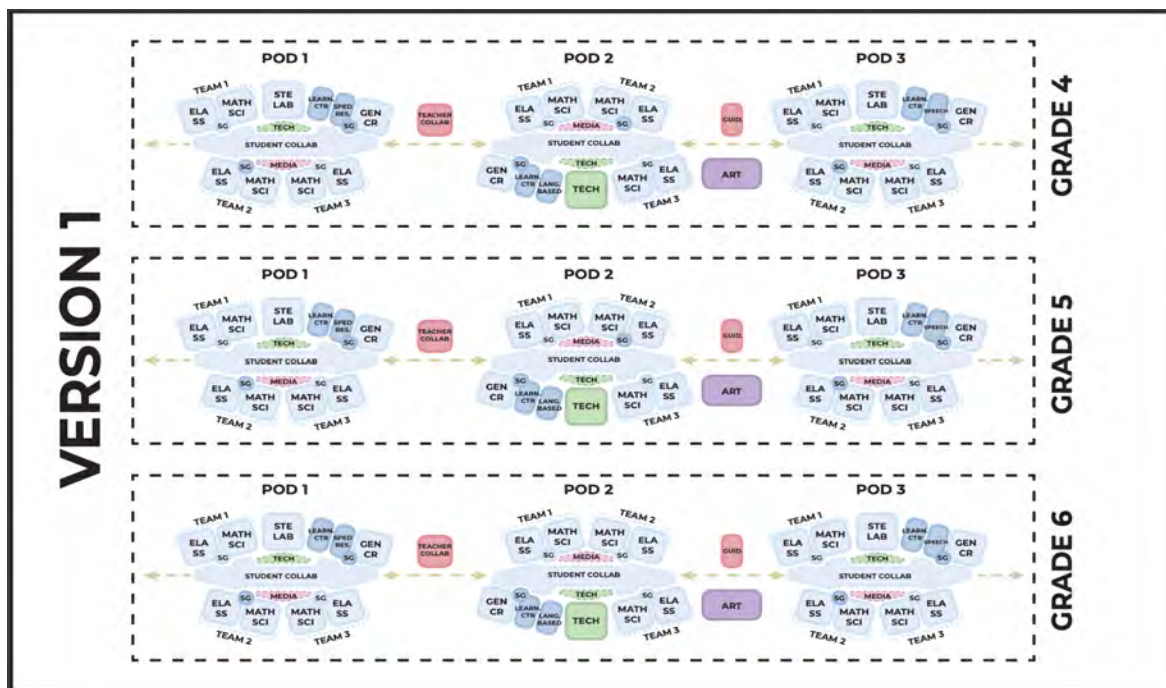


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distractions, allowing students and teachers to focus on learning. Additionally, the neighborhood design lessens transitions between classrooms and the distraction of passing classes. The open layout also enables teachers to monitor their students while still using classroom space, ensuring safe and productive learning environments. Extended learning spaces will allow all teachers to incorporate current Universal Design for Learning (UDL) strategies, allowing for more options for multiple means of representation, engagement, and expression, increasing connection to their learning. The intent is to provide an open concept multi-purpose space or spaces that foster a sense of community, belonging, and collaboration within the grade level. When designing this type of space, it will be beneficial for this concept to be located within the community connections and access zone of the overall school design. Special consideration will be given to provide teachers with professional development on working collaboratively to plan lessons in order to schedule the space use and make decisions on supervising students.

*Professional Development for a Neighborhood Design:* The level of academic integration of a neighborhood model requires us to provide professional development and time to allow teachers to envision what interdisciplinary collaboration might look like. As the design progresses, we will engage all staff, especially specialist teachers to encourage them to develop ways they can become more integrated into the core academic areas of the building. This may include workshops, simulations with staff, and other professional development prior to and after the building opens.

### Conceptual Overall Neighborhood Diagram







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During our interactive educational visioning sessions with consultant Michael Pirollo, participant feedback included creating a school with the following goals and guiding principles:

1. Empowered Every Learner through Collaboration and Adaptability
    - Guiding Principle: Design environments and practices that evolve with changing needs, foster teamwork, and support diverse learners.
  2. Create safe, lasting, and future-ready environments
    - Guiding Principle: Ensure schools are safe, comfortable, accessible, and supported by technology that is lasting and easy to upgrade.
  3. Foster professional collaboration and growth
    - Guiding Principle: Provide spaces and opportunities that bring staff together to collaborate, learn, and grow.
  4. Support the whole child and foster belonging
    - Guiding Principle: Create inclusive spaces and programs that nurture health, creativity, and pride, while fostering belonging and lasting community connections.
  5. Honor community, culture, and core values
    - Guiding Principle: Reflect Chelmsford's history, celebrate family culture and values, and embody PRIDE\* as a foundation for learning.
- \*Perseverance, Respect, Integrity, Dedication, Empathy*

Additional considerations for the project include the cost, continuity for students, crossover of age levels, and developmental practicality.

Any reconfiguration that requires students and staff to be reassigned between schools will be planned accordingly and ideally two years ahead of the planned transition. During the school year before transition, we will plan activities that bring together the groups of staff who will be assigned to the same building for culture-building activities. Our academic curriculum is aligned between the two buildings, which will ease the transition, along with our shared core values.

### **Curriculum Delivery Methods and Practices**

#### ***Current***

Curriculum delivery aligns with the Massachusetts Curriculum Frameworks. However, space limitations currently restrict our ability to deliver inquiry-driven, hands-on, or project-based learning effectively across all content areas, particularly Science, Art, and Computers (Technology). Teachers cannot rearrange classrooms due to their small size, which limits flexibility in instruction.

Chelmsford Public Schools places a strong emphasis on the use and access of curriculum materials rooted in foundational elements and schedules time within the school day for the planning processes and evaluation approaches needed to build and maintain our curriculum.



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Well-crafted curricula are the result of purposeful collaboration, shared understanding, and goal setting, and a hyper focus on what students need to know and be able to do. CPS employs a wide range of effective instructional methodologies that strive to strike a balance between current best practices and progressive methodologies that could become future best practices. Specifically, we place a strong emphasis on the use of Universal Design for Learning (UDL) guidelines as a delivery method of our curriculum. We are well-resourced in curriculum, both in hard copy and technology based. To that end, we provide a rigorous program of studies that is grounded in researched practices and embodies a rich program of experiential and exploratory learning experiences, designed to utilize an interdisciplinary approach, and provides authentic connections to the world around us.

Overall, Chelmsford Public Schools curriculum and instruction are delivered in heterogeneously grouped, inclusive classrooms. Lessons in all classes are differentiated based on formative assessment data and designed to include whole group, small group, and individual work, with an increasing inclusion of anywhere, anytime access to technology. While program titles may change over time, our curriculum and instructional methodologies will require that future program considerations continue to be focused on interdisciplinary, differentiated, hands-on, and experiential learning experiences that require flexible space for movement, demonstration, project-based work, and collaboration. Additionally, it is important to recognize the district's commitment to a push-in and co-taught model of support for students, which requires learning spaces that allow for multiple adults to support students in the same space. Also important to note is the district has committed to supporting the Project Lead the Way (PLTW) program, K-12, which requires both space and specialized equipment for students to learn concepts that build vertically and ultimately lead into our dual enrollment courses at Chelmsford High School, where students can obtain college credit while taking PLTW classes.

Using our current programs, teachers create a variety of differentiated, collaborative, and small group learning opportunities. General education teachers, special education teachers, and reading specialists share students across classrooms, using both push-in and pull-out instructional practices throughout the day. Because current classroom spaces are not designed for this type of instruction, “push-in” support and small group work often take place in classroom corners, on the floor, and at small tables in the back of classrooms. Pull-out support often occurs in hallways, repurposed closets, shared office spaces, and in converted classrooms with makeshift barriers to create a sense of classroom space. We have also converted space within the current library to accommodate multiple instructional areas for simultaneous instruction since all other space options within the school have been exhausted.

Classroom practices are supported by our district-wide department coordinators. Department Coordinators are full-time content administrators, dedicated to creating cooperative, collaborative, professional relationships with teachers to enhance staff and student learning



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across the district. Department Coordinators work directly with new and veteran teachers to implement effective instruction to enhance student learning. They support teachers to analyze student data, including work samples, assessments, and social-emotional observations, and to inform strategic instructional practices and collaborative problem solving. They provide professional development opportunities and support to teachers as they implement the district curriculum and achieve the district's instructional goals.

It is especially important to highlight that we are also in a unique position in Chelmsford, that Parker Middle School houses Chelmsford Telemedia's (CTM) TV station. CTM is an integral part of our middle and high school programming, including specialized projects, theater productions, and a dedicated club for students to learn hands-on television programming development and editing. This relationship with CTM continues to the high school level, when students can take advantage of the elective television course that expands students' media literacy and production skills beyond the school level and into the community by running programming for community events that connect everyone through digital media technology. As their mission states, ...we give voice to the Chelmsford community.”

### ***Proposed***

Chelmsford Public Schools invests in significant personnel, professional development, high-quality instructional materials, and time for our students that is in-line with best practices in education and has an articulated strategy for district improvement through the use of Universal Design for Learning (UDL) and multi-tiered systems of support (MTSS). Programmatically, the new educational space would need to support continued emphasis on small group instruction and intervention for literacy and mathematics, allow for a hands-on, inquiry-based STEAM education, provide opportunities for project-based learning, continue to enhance a robust arts/specialized subjects program, and provide our special education programs designed to support students in their home community.

The reading and English Language Learner (ELL) teachers, special education teachers, and interventionists seek to provide more intervention and support within the regular classroom setting and during WIN instructional time, so there is a true “double dose” of instruction to reduce learning gaps. For this shift to be effective, classrooms must have sufficient space and be designed to support multiple activities happening simultaneously. Additionally, there should be small group rooms between classrooms that are accessed both from the hall and the classroom to maximize accessibility and flexibility in the level of uses and supports provided in these spaces. The small group rooms would be accessible for small group instruction and assessment. This would allow all students needing support a connection to their peers and for the classroom teachers to deliver instruction as the content expert.



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Currently, there are no adequate or dedicated rooms for specialist teachers or interventionists to meet with staff or students. Many of these staff work with students in converted storage closets/spaces or shared spaces with multiple colleagues. In any design enrollment option, the district seeks dedicated space for specialist teachers and interventionists to deliver and support instruction.

Through current and ongoing professional development, we will develop a more developmentally appropriate, interdisciplinary delivery of curriculum and instruction. The proposed design of the neighborhood model with dedicated space for support personnel and intervention space for the building would enhance this type of learning for our students. The following programming, as described, would support inclusive practices and a project-based curriculum.

The new facility will be designed to support a pedagogical shift toward collaboration, project-based learning, and STEAM integration. New spaces must include:

- Flexible seating and movable furniture to facilitate dynamic, student-centered, and collaborative instruction.
- Designated small group instructional areas and collaboration spaces (breakout spaces) outside the main classroom to support individualized learning and project work.
- Adequate storage for curriculum materials, equipment (like science kits), and student projects to ensure materials are readily accessible for hands-on delivery.

### **English Language Arts/Literacy**

#### ***Current***

#### **[CPS Current Curriculum Programs](#)**

Chelmsford Public Schools provides a standards-based English Language Arts curriculum that is aligned with the *Massachusetts English Language Arts and Literacy Curriculum Framework* and incorporates primary resources published by Heinemann Publishing, Houghton Mifflin Harcourt, Wilson Reading, and Heggerty Publishing. English Language Arts students will experience both a strong foundational reading experience and a thoughtful, enriching, and meaningful curriculum designed to foster growth in critical and creative thinking, create confident and understanding readers, and develop clear, effective, and fluid speakers and writers. We use a multi-text approach designed to support whole-group, small-group, and independent learning opportunities with the ultimate goal of providing students with learning experiences that connect them beyond the walls of the classroom with authentic text access and experiences in reading, thinking, talking, writing, and reflecting.



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## Key Program Features

- Multisensory structured literacy approach to teach foundational reading that integrates phonemic awareness and phonics, spelling, and handwriting skills
- Finding connections through authentic, diverse literature in a multitude of genres
  - Text to Text
  - Text to Self
  - Text to World
- Self-expression through writing
- Writing for different audiences and multiple purposes
- Integration of speaking and listening skills
- Understanding demonstrated through individual choice and voice
- Collaboration and communication skills

## ***Proposed***

While program titles may change over time, our curriculum and instructional methodologies will require that future program considerations continue to be focused on interdisciplinary, differentiated, hands-on, and experiential learning experiences that require flexible space for movement, demonstration, project-based work, and collaboration. The district is looking for classrooms that are designed to complement spaces that adapt to support whole group lessons, independent reading and writing time, small group planning and discussion, and student-led presentations. Additionally, it is important to recognize the District's commitment to the co-taught model. Reading specialists and interventionists require learning spaces that allow for multiple adults to support students in the same space.

## **Mathematics**

### ***Current***

Chelmsford Public Schools provides a standards-based mathematics curriculum that aligns with the *Mathematics Curriculum Framework* and incorporates primary resources published by McGraw-Hill and Big Ideas, which provide a balanced approach to teaching. Our programs integrate activity-based learning with teacher-guided instruction to help students develop problem-solving skills. The programs aim to foster conceptual understanding and mastery by using inquiry-focused lessons, sense-making routines, and opportunities for student discourse and differentiation. Both programs include a wide variety of web-based, digital materials for students and teachers. Currently, 5th and 6th-grade classes are heterogeneously grouped, while 7th and 8th classes have three (3) instructional levels. In both 7th- and 8th-grade, students are placed in *Math 7 or 8*, *Accelerated Math 7 or 8*, or *Honors Math 7 or 8*. 8th-grade students take either *Math 8* or *Algebra 8*. Students in 7th- and 8th-grade are placed in a mathematics class based on their performance against predetermined criteria. Students are screened for placement at the end of 6th grade and have the opportunity to place into a different level of math if requested.



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## Key Program Features

- Focus on real-life problem-solving skills
- Write and solve equations
- Apply appropriate computational skills, procedural fluency
- Ability to model mathematical concepts
- Ability to use mathematical tools (ruler, calculator, etc.)
- Ability to use mathematical discourse in problem solving

## ***Proposed***

The district has recently focused on helping teachers develop a more nuanced understanding of mathematical fluency, math discourse, and “just in time” assessments to group student instruction, and as part of that effort, mathematics specialists are working with teachers to move away teaching from teaching math as a procedural standard mathematic algorithm and to integrate activity-based learning with teacher-guided instruction to help students develop problem-solving skills to foster conceptual understanding and mastery by using inquiry-focused lessons, sense-making routines, and opportunities for student discourse and differentiation. As noted above, mathematics classes also have a co-taught model of instruction. The district is looking for flexible space for whole group, small group, and individual instruction, and the ability for multiple adults to occupy the space simultaneously.

## **Science**

### ***Current***

Chelmsford Public Schools provides a standards-based Science curriculum that is aligned with the *Massachusetts Science and Technology/Engineering Curriculum Framework* and incorporates primary resources published by Foss Science and McGraw-Hill, which provide a wide variety of web-based, digital materials for students and teachers. Additional supplemental resources are used as determined by the science department. The science curriculum includes an emphasis on active investigation through hands-on activities, the integration of scientific and engineering practices, and a phenomena-based approach that connects concepts to real-world events. The program also incorporates integrated literacy and mathematics, uses both hands-on and digital resources, and promotes collaborative learning. The science department focuses on helping students apply their developing skills and knowledge in a hands-on, inquiry-based lab environment in an effort to gain an appreciation and understanding of the world around them.

We have a few dedicated outdoor learning spaces that support hands-on science learning. A few small garden beds are used to study plant life cycles and to learn about the impact of soil, sunlight, water, and other variables on the growth and development of plants. The schools also have easy access to conservation land that students can explore during plant and animal studies.





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While teachers have been very resourceful in making use of the existing classrooms and common spaces for science instruction, the limitations of the current spaces pose significant challenges to implementing the current science programs.

### Key Program Features

- Application of the scientific method
- Collecting, analyzing, and drawing conclusions from relevant data
- Lab activities for hands-on learning

### ***Proposed***

The project design should ensure a focus on laboratory science activities and hands-on learning experiences that will allow the science curriculum to be implemented with fidelity. The science curriculum assumes a teachers' ability to set up differentiated, inquiry-based, material-intensive science experiments that students can run and observe, either in the classroom or in outdoor learning spaces. It also assumes the ability to teach in cooperative, small group learning teams. A goal for the District is to have educational facilities that allow staff and students to fully realize this kind of science learning. Currently, space limitations in classrooms, including the lack of proper set-up, breakdown, equipment storage, and a lack of breakout space, often necessitate a truncation of the full scientific process for science instruction. Further, our grade 5 and 6 science teachers also instruct mathematics. The lack of space in the classrooms affects the transition from one subject to another and wastes valuable teaching time having to set-up and break down experiments to accommodate content changes.

The District envisions a type of project-based, investigative learning taking place in the general education classrooms, with additional potential for using extended learning spaces, shared small group rooms, outdoor learning spaces, and dedicated STE rooms for experiments and/or demonstrations that a classroom alone may not be able to support.

### **History and Social Studies**

#### ***Current***

Chelmsford Public Schools provides a standards-based curriculum that is aligned with the *Massachusetts History and Social Science Curriculum* and incorporates primary resources published by Pearson Education and the MA DESE Investigating History curriculum, which provides a wide variety of web-based, digital materials for students and teachers. In grade 5, there is a focus on United States History, the Civil War, and the Modern Civil Rights Movement. In grades 6 and 7, there is a focus on the development of civilization through the ancient world that allows students to make connections to their modern experience. In grade 8, students gain an understanding of civic life, politics, government, and a history of government's foundation and development in our country.



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## Key Program Features

- The grade 5 curriculum focuses on inquiry-based learning that integrates literacy and English Language Arts, along with a comprehensive curriculum covering topics including the First Americans, colonial life, the American Revolution, and the Civil War through a storytelling approach.
- The grade 6 and 7 curriculum focuses on world geography and ancient civilizations and has key literacy and writing skills embedded in the program.
- The grade 8 curriculum focuses on U.S. & MA government and civic life and has key literacy and writing skills embedded in the program, as well as having students look at situations from various perspectives.
- Overall focus on historical inquiry, culturally sustaining pedagogy, civic engagement, and historical empathy. The aim is to connect current events to historical context, develop critical thinking, and civic skills.
- Understanding different types of oral communication.
- Purposeful research.

## ***Proposed***

The project design should provide multiple venues to allow for oration, debate, and presentations in an effort to create opportunities for students to demonstrate their mastery of skills. The learning spaces must continue to support the instructional expectations outlined in the current Massachusetts History and Social Science Curriculum Framework. Consistent with the district's proposed curriculum delivery model for English Language Arts, instruction is grounded in interdisciplinary connections, differentiated supports, and hands-on, inquiry-based learning experiences. To effectively implement these approaches, classrooms must offer flexible, adaptable space that accommodates movement, demonstrations, primary-source investigations, project-based work, and collaborative learning.

The district is seeking classrooms designed to complement adjacent shared learning areas and to support a full range of instructional practices, including whole-group lessons, independent reading and writing, small-group planning and discourse, and student-led presentations. Additionally, history and social science classes use a supported classroom model for special education, where students may be assisted by a paraeducator, as well as the use of reading specialists who push into the classes. This requires learning environments that are appropriately sized and configured to allow multiple educators to work with students within the same space. These design elements will ensure that future program delivery remains aligned with district priorities and supports equitable access to high-quality instruction.



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## **World Languages**

### ***Current***

Chelmsford Public Schools provides a standards-based world languages curriculum that is aligned with the *Massachusetts* Arts rotation to students in grades 7 and 8, incorporating primary resources from Wayside Publishing. There are currently no world languages offered in grades 5 and 6. Instructional strategies and learning experiences are influenced by the Organic World Language (OWL) method, in which students are instructed and engage in the target language for the majority of the time. It is hoped that students will become lifelong learners in a rapidly changing world that promotes equity and multicultural understanding.

### **Key Program Features**

- Communication - spoken and written
- Connecting to academics and careers
- Communities - worldwide
- Comparing language and culture to one's own
- Exploration & celebration of cultures and overall cultural awareness

### ***Proposed***

Should the project design be a grade 5-8 school, consideration should be given to provide the ability to create areas for learning in the World Language spaces and allow for multi-modal instruction and learning. Where the focus is on authentic communication with activities that require students to use the target language for meaningful communication, rather than rote memorization. We are not considering offering World Languages for students in grades 4-6.

## **Academic Support Programming Spaces**

### **English Language Education (ELE)**

#### ***Current***

The District ensures that students with limited English language proficiency, English Language Learners (ELL), fully access the general education curriculum. ELL students participate in the regular classroom setting where teachers adapt instruction, materials, and assessments to make grade-level content comprehensible. In addition, ELL teachers promote English language development in a one-on-one or small group setting. The district provides bilingual translators or interpreters, when needed, to facilitate communication between ELL families and the school. ELL services are currently provided in small pull-out and in-class settings that were not originally designed for this purpose, with many distractions for students while receiving services, such as being located next to a cafeteria or near a music room. While services are being provided, space for one-on-one tutorials, small group instruction, and materials prep and storage



## Parker Middle School Educational Program

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is not readily available and is often provided in a less-than-efficient manner. The current classroom space makes it difficult for push-in services.

### ***Proposed***

Chelmsford Public Schools is committed to providing ELL services in the general education environment to the greatest extent possible and complies with the requirement from MA DESE that general education core teachers hold the Sheltered English Immersion (SEI) endorsement, there are situations where a student requires small group or pull out 1:1 instruction directly from an ELL teacher. Additionally, ELL teachers often interface with parents and translators to provide access and support at meetings, to translate documents, and/or at other school functions. There is not currently dedicated space for the ELL teacher in any of the identified buildings. Dedicated space will allow for students, parents and staff to be able to meet for instructional and parent engagement purposes that currently take place in less confidential or noisy/distracting environments. Dedicated space for these purposes will allow for effective communication and translation of meetings in a low stigma and distraction free environment.

Chelmsford Public Schools will maintain ELL education in all project scenarios. The staffing allocation and structure will continue to be reviewed annually based on student need and home school locations. The District currently employs 7.0 full-time ELL Teachers to meet the needs of approximately 270 students district wide. We will continue to support a general education-based SEI program in all buildings for future years.

### **Student Guidance and Support Services**

#### ***Current***

Chelmsford Public Schools is committed to providing a researched-based social emotional learning curriculum that is aligned with the *Collaborative for Academic, Social, and Emotional Learning (CASEL's)* standards and incorporates primary resources published by *Second Step*. The curriculum is designed to help students communicate and collaborate, solve problems, make good decisions, set and meet goals, and process their emotions; skills they will use in the classroom and for the rest of their lives. The *Second Step* curriculum provides a consistent, structured, safe context for exploring these issues while also building a cooperative, inclusive classroom community. The school schedule provides 30 minutes per week for Second Step lessons. Instruction includes a comprehensive, sequenced collection of weekly lessons for Grades K-8 with supplemental advisory activities at the upper grade levels. There are opportunities for voice and choice, using the *Real Voices* videos from the curriculum with relatable stories from real students, and family resources to bring the learning home.

Middle school grade-level topics taught include:

1. Mindset and Goals
2. Developing a Positive Sense of Self



## Parker Middle School Educational Program

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3. Thoughts, Emotions & Decisions
4. Managing Relationships & Social Conflict

Beyond providing a robust social emotional learning curriculum, Chelmsford Public Schools remains focused on meeting the unique learning needs of our students by providing services that support skill development and maximize learning opportunities. Services and support are provided by a variety of professionals, in a variety of settings including, licensed school counselors, school psychologists, and social workers.

Current school counseling staff at Parker Middle School include 2.0 FTE school guidance counselors, 2.0 FTE school psychologists, and a 1.0 FTE social worker. Counseling services are provided for students whose IEP goals center around social emotional adjustment concerns. Counselors also instruct skills such as time management, conflict mediation, and offer short-term mental health support. It is important to note that Chelmsford subscribes to a school psychologist approach at each of their schools in addition to a guidance counselor. School psychologists assist children in crisis, assisting with making students feel safe and comfortable at school, and strengthen communications between the school and home. The school psychologist, with parental permission, administers educational and related testing as required by regulations. Our school counseling teams work with teachers, parents, and students to teach respect, responsibility, and conflict resolution. The psychologist supports the school community by working with small groups of students to facilitate collegial relationships and assist with social and emotional issues. Additionally, Parker Middle School has a dedicated social worker who offers direct services like individual/group therapy, collaborates with staff and parents, and connects families with community resources, ensuring students' holistic needs are met for them to learn and thrive.

### ***Proposed***

Chelmsford Public Schools remains committed to continuing to support the social emotional wellbeing of our students. SEL instruction helps our students develop essential Lifeskills like managing emotions, setting goals, showing empathy, and making responsible decisions, which leads to better academic performance, improved social skills, and enhanced long-term success in school and life.

The design of purpose built, sound-proof and well-designed counseling spaces (both professional office and meeting room/spaces) in the new or renovated building will allow school counseling providers to meet individually and in small groups with students in a low stigma environment, participate in phone conversations with outside providers and parents confidentially, and greatly increase the efficiency of supports that may be provided to students in a multidisciplinary team, as well as being able to work with students in office settings, in-class rooms, and in small group settings throughout the building. School counselors will be able to work in a manner that supports confidentiality and creates a calm, supportive environment that allows students to build



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trust and communicate about their concerns to a key adult in a developmentally appropriate manner.

### TEACHER PLANNING

#### *Current*

Chelmsford teachers currently benefit from a schedule that provides them with one preparation period and one common planning period four days a week. This time, as well as time before, during and after school, and scheduled professional development days provide opportunities for educators to collaborate for purposes such as grade level and content team planning, curriculum development, review of student progress data (academic and social/emotional), participate in related trainings and professional development, parent/guardian meetings, and special education/504 team meetings. The middle school does not currently have dedicated planning spaces for grade level or content teams. Teachers typically select a colleagues classroom to work in when that room is available and would benefit from adult friendly common workspaces that foster this type of collaborative work as well as full staff meetings/gatherings.

#### *Proposed*

Chelmsford teachers would benefit greatly from adult friendly common workspaces that foster collaborative work as well as full staff meetings/gatherings.

### PROFESSIONAL DEVELOPMENT

#### *Current*

The District is committed to supporting our educators in their efforts to participate in continuous professional learning and implementation of best and next practices to help them meet the ever-changing needs of their students and result in increased and sustained growth and achievement for all students. The District Professional Development Plan is intended to benefit both teachers' individual development as well as school and district-wide improvement efforts by connecting meaningful differentiated professional development with school and district improvement goals. CPS has developed a professional development (PD) calendar that includes one (1) full day PD day, and six (6) ½ day PD sessions at the elementary and middle school levels and seven (7) ½ day PD sessions at the high school level.

On-site PD sessions may be led by contracted consultants or by in-house experts. In addition, the district also supports the individual and collective efforts of teachers, who pursue professional development through other avenues such as graduate level coursework, workshops and conferences, webinars, professional organization affiliation, book groups, and teaching or facilitating classes or PD sessions.





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## ***Proposed***

The inclusion of adaptable adult friendly common workspaces will be beneficial in supporting our professional development efforts. These areas should have flexible seating, workspaces, and sustainable technology for both presentation and access to enhance teacher learning and collaboration. Finding common areas outside of a two- and four-person teaching team gathering in a classroom is difficult as it requires the use of larger spaces at the high school. These larger areas are typically already in use by the high school staff making it difficult to provide high quality professional development and collaboration with multiple users.

Ideally, we would like to disburse allowable teacher workroom square footage to support one larger teaching planning space per grade level. Teacher workrooms are more than just a place to copy and laminate classroom materials. Our desire would be to create a space that allows for teams of teachers to meet to collaborate and plan lessons as well as review data collectively and have discussions about student needs.

*Professional Development for a Neighborhood Design:* As stated in the narrative about the Neighborhood Model Design, the level of academic integration of a neighborhood model requires us to provide professional development and time to allow teachers to contemplate what interdisciplinary collaboration may look like. As the design progresses, we will look to engage all staff, especially specialist teachers to have them think about ways they may become more integrated in the core academic areas of the building. This may include workshops, simulations with staff, and other professional development prior to and after the building opens.

## **PRE-KINDERGARTEN & KINDERGARTEN**

While the District has robust Pre-Kindergarten and Kindergarten programming, it is important to note that our Pre-Kindergarten programs are housed at the Westlands School and as such, has no bearing on the middle school project configuration. However, in the grade 4-6 configuration option, moving grade 4 to the middle school would provide additional space in our four elementary schools to better accommodate the projected elementary (including Kindergarten) enrollment increase in the future.

## **LUNCH PROGRAMS**

### ***Current***

The school district employs a full time Director, Operations Supervisor, Registered Dietician, Team Leaders and part-time General Workers and Drivers to plan and execute the school nutrition program districtwide. The program is funded through the school nutrition revolving fund, following Federal USDA guidelines and MA DESE guidelines. There are kitchens and cafeterias in each school. The Parker Middle School currently has a full-service kitchen preparing and serving breakfast and lunch to students each day. Approximately 185 breakfasts



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and 450 lunches are served daily, with student participation growing each year. There are four lunch periods and three serving lines to accommodate the current students in the limited cafeteria seating space. The kitchen was upgraded in 2021 as part of a town funded capital project.

### ***Proposed***

In the building option with the same grade 5-6 configuration, some changes would be proposed for a new full-service kitchen. A larger kitchen (square footage) would be desirable, as well as larger storage spaces for dry goods, refrigeration, and freezer space to increase the ability to purchase bulk quantities at a greater discount price. Placing the kitchen and cafeteria closer to the student entrance near the bus drop off would be helpful for serving breakfast.

In the building option with the grade 4-6 reconfiguration, some changes would be needed to the full-service kitchen since additional meals would be prepared and served each day. The meal increase is estimated to be 135 additional breakfasts and 250 additional lunches per day (grade 4), based on current participation rates. The number of serving lines would need to be increased from three to four due to the increased volume of students and limited number of lunch periods to accommodate the learning schedule. A larger kitchen (square footage) would be desirable, as well as storage space for dry goods, refrigeration, and freezer space to increase the ability to purchase bulk quantities at a greater discount price. A larger cafeteria would be required to accommodate the additional students. Placing the kitchen and cafeteria closer to the student entrance near the bus drop off would be helpful for serving breakfast.

In the building option with the grade 5-8 reconfiguration, some changes would be needed to the full-service kitchen since additional meals would be prepared and served each day. The meal increase per day is estimated to be 150 additional breakfasts and 510 additional lunches (grade 7-8), based on current participation rates, which is nearly double what is served in the grade 5-6 configuration today. The number of serving lines would need to be increased from three to four due to the increased volume of students and limited number of lunch periods to accommodate the learning schedule. A larger kitchen (square footage) would be desirable, as well as storage space for dry goods, refrigeration, and freezer space to increase the ability to purchase bulk quantities at a greater discount price. A larger cafeteria would be required to accommodate the additional students. Placing the kitchen and cafeteria closer to the student entrance near the bus drop off would be helpful for serving breakfast.

## **TECHNOLOGY INSTRUCTION POLICIES AND PROGRAM REQUIREMENTS**

### ***Current***

The technology vision of Chelmsford Public Schools is to cultivate a dynamic learning environment where technology seamlessly integrates into classroom instruction, providing each and every student and staff member with unfettered access to curriculum and real-time



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information. Our technology program is not just about providing access; it's about fostering digital equity, ensuring that each and every student in our learning community has the tools necessary to make technology an integral part of their educational journey, encompassing learning, assessment, teaching, communication, and collaboration.

Through ongoing and comprehensive professional development initiatives, all staff members will have numerous opportunities to acquire the knowledge and skills essential for integrating emerging technologies into their evolving curriculum and instructional practices. We are committed to empowering every user to seek out information, solve problems, and engage in safe and responsible digital behavior, thereby instilling and practicing positive digital citizenship. With equitable access to cutting-edge technology, both students and staff will have limitless opportunities to unleash their creativity, demonstrate understanding, and hone critical thinking skills, ultimately preparing Chelmsford Public Schools' students for the challenges of their future.

The CPS Network is one of the most advanced networks in the state. It has recently been heavily invested in to bring all internal connections up to current specifications. This process began in the summer of 2017 when the Parker Middle School had all switching and wireless access replaced. Parker served as a pilot and template to model the other buildings in the district after. We constantly monitor the network at Parker and frequently interact with staff to determine if their overall experience was enhanced with the new infrastructure. We heard comments such as: "This is amazing, I never lose connectivity.", "Everything just works!", "This is how a network is supposed to be.", "I love it. All my students can use the Chromebooks at one time now." This led us to the conclusion that we had made the proper choices in hardware and increased the overall capacity of the wireless access system. Once we were certain we had appropriated the correct hardware resources to meet and exceed the needs of network users, we were able to take the components, which made up that infrastructure, and apply the appropriate pieces to other schools in the district based on the size and user capacity at each location.

CPS upgraded the remaining buildings in the district during the Summer/Fall of 2018 and each now has a very robust, scalable network in place for our users. A portion of the work was funded through town capital, and nearly \$ 700,000 of the work was funded through a grant written by the ICTS department funded through the state. Now, every school has brand new HP/Aruba switching, HP/Aruba wireless infrastructure, brand new copper cabling to all access points, and brand new OM3 fiber cabling between all network closets in the building. The fiber cable enhancements have upgraded the bandwidth between closets and increased the bandwidth connecting the buildings back to the core switching environment at the Central Office. This upgrade also increased the number of users we can serve at any given time and will allow us to double our capacity by adding a few additional components if we ever find ourselves in a position where more is needed. Users on our wireless access system may now enjoy speeds that are very close to wired connection, and we can accommodate users who tend to carry more than



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one device (i.e. phone, watch, laptop, or tablet) at any given time. Our classrooms will no longer encounter problems when every student attempts to use a device at one time. In fact, every student could use three devices at one time, and our wireless access points (APs) would handle the throughput. This is known as having the proper density for the given application.

The upgrade impacted every single corner of the building. It is available to all students, staff, and guests in every one of our schools. When upgrading infrastructure, it is important that the work will positively impact all user groups. We are pleased that everyone, regardless of classroom, subject matter, grade level, or role within the organization, has the exact same equitable access to the network and the resources of the network.

Below are some basic statistics about the network makeup, and a diagram that shows the way our end users connect to the network, and how the network capacity handles those users.

## **HP/ARUBA 5400 SERIES SWITCHES**

- Modular design with expansion bays
- Autosensing 10/100/1000 BASE-T connectivity
- All POE+ ports
- Capable of data transfer up to 754 Gb/s
- Able to upgrade firmware without taking the switch down due to multiple management cards
- Energy efficient and less noisy than 1u style switching
- High speed/capacity architecture
- Hot swappable modules
- Redundant power supplies
- Advanced security and routing features
- Lifetime replacement warranty

## **HP/ARUBA WIRELESS SYSTEM**

The Aruba 7220 controller cluster can scale up to the following levels, in fully redundant mode.

- Number of access points: Up to 1024
- Maximum number of concurrent users/device: ~24K
- Active firewall sessions: ~2M
- Concurrent IPSec Sessions: ~24K
- Maximum mac table size: 128K
- Maximum arp table size: 30K
- Firewall throughput: 40Gbps
- When both controllers in the cluster are up and running (no controller failure has occurred), the items in bold above can be multiplied by two.

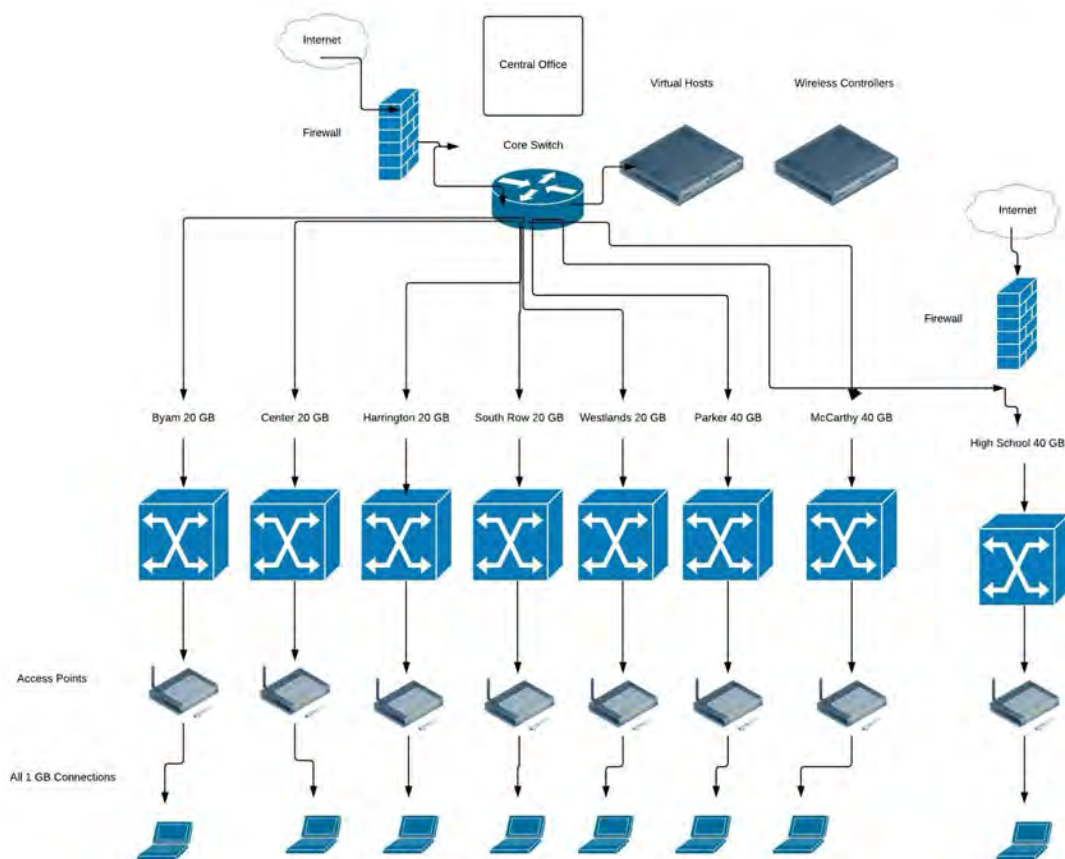


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- If higher scaling is required in the future (very unlikely, but in theory), the cluster can be expanded by simply adding one or more controllers in the cluster
- The AP315 access point includes a 5GHz 802.11ac 4x4:4SS MU-MIMO capable radio that can deliver up to 1,733Mbps peak data rate, and up to 3 simultaneous MU-MIMO client devices (HT20 (*under the right configuration, RF and client environment etc.*) AND a 2.4GHz: 802.11n/ac 2x2:2SS which can deliver up to 400 Mbps peak data rate (2SS/VHT40), 300Mbps at 2SS/HT40 and 144Mbps at 2SS/HT20 (*under the right configuration, RF and client environment etc.*).
- A WLAN design using the AP315 type, can be modeled around 75 client devices per access point. Given the current number of access points, the average number of clients per AP is about 5-6 while the most utilized access points have about 20 clients per AP.
- Total current clients 3,000
- Total current APs 587
- Two controllers to provide redundancy and load balance
- 802.1x authentication to avoid losing passwords
- Captive portal guest network for self-service access

CHELMSFORD PUBLIC SCHOOLS NETWORK

Tony | October 23, 2018







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## **INFRASTRUCTURE ENHANCEMENTS**

In 2023, the district upgraded internet bandwidth to 15Gbps. We now have an abundance of capacity to fully serve every member of the CPS community.

Internet services fall under the federal government program known as E-rate. This program allows schools to receive discounts on technology purchases in two categories. We leveraged E-rate to purchase network equipment and installation services, and we will leverage it again to enhance our Internet connection. The current CPS discount rate is approximately 40%. There are a number of calculations in the background that contribute to the actual final cost of network equipment and installations. These items change annually based on school enrollment numbers and free and reduced lunch population percentages.

## **EDUCATIONAL TECHNOLOGY HARDWARE**

From grades 5-12, Chelmsford has implemented a 1:1 device program for students. The district provides all grade 5 and 9 students with a brand-new device which they use for four years. At the end of four years, students return the device to us, and we repurpose them for elementary use. Teacher devices are also replaced on a four-year cycle. The device type is presently Chromebook. Every classroom has a similar technology experience. All classrooms are outfitted with 65" interactive panels on moveable and height adjustable stands with an enhanced sound bar and document camera.

## **DIGITAL RESOURCES**

In addition to the network upgrades, we also provide equitable access to a number of digital learning resources. The 1:1 initiative will undoubtedly increase the amount of access to these resources. At present, we offer grade appropriate tools to all of our schools. Below is a sampling of these tools, but by no means an exhaustive listing of everything available.

### **i-Ready**

iReady assesses students' academic skills in reading, helping teachers design individualized instruction for them based on their unique needs while setting a personalized pathway for students within the iReady Instruction.

### **iXL**

IXL (from "I excel") is a math & language arts practice website for K-12 (subscription based). It has unlimited questions on thousands of math topics and a comprehensive reporting system.

### **LEXIA**

Lexia® Core5® Reading supports educators in providing differentiated literacy instruction for students of all abilities in grades pre-K–5. Lexia's research-proven program provides explicit,





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systematic, personalized learning in the six areas of reading instruction, targeting skill gaps as they emerge, and providing teachers with the data and student-specific resources they need for individual or small-group instruction.

### **Raz-Kids**

Raz-Kids is an award-winning teaching product that provides comprehensive leveled reading resources for students. Every eBook is available in on-line and mobile formats, and allows students to listen to, read at their own pace, and record themselves reading.

### **Brain Pop**

BrainPop is a group of educational websites with over 1,000 short, animated movies for students in grades K-12, together with quizzes and related materials, covering the subjects of science, social studies, English, mathematics, engineering and technology, health, and arts and music.

### **Language Live**

LANGUAGE!® Live is a comprehensive, blended literacy solution. One portion of the program is face-to-face teacher-led instruction; the other portion is technology-based, independent learning.

### **Google for Education**

Google for Education is the same set of apps that you know and love—Classroom, Docs, Drive, Calendar, Meets, and more— but designed with new intelligent features that make work easier and bring teachers and students together.

### **Overdrive/SORA**

OverDrive is a free service offered by our library that lets you borrow digital content (like ebooks and audiobooks) anytime, anywhere. Every OverDrive collection is slightly different because each library or school picks the digital content they want for their users.

### **Keyboarding Without Tears**

Keyboarding Without Tears is an elementary web-based curriculum that makes it easy for teachers to teach their students the pre-keyboarding and keyboarding skills - such as typing, general computer readiness, digital citizenship and online test prep - they need to succeed on any assignment, in any setting.

### **Project Lead the Way**

PLTW empowers students to develop and apply in-demand, transportable skills by exploring real-world challenges. Through our pathways in computer science, engineering, and biomedical



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science, students not only learn technical skills, but also learn to solve problems, think critically and creatively, communicate, and collaborate. We also provide teachers with the training, resources, and support they need to engage students in real-world learning.

### Curriculum Companion and Technology Integration Listing

Please use [this link](#) for a listing of all the tools available to enhance and support our amazing curriculum.

All access to technology and/or digital tools is accomplished by contacting the ICTS department and/or the Curriculum Department. All users have the ability to open help requests through our helpdesk system (Incident IQ). Parents and students can also open help tickets or request tech help through our website. Ultimately, everything flows back through the ICTS department, and we involve the proper staff members to assist with all user needs.

Teachers also have the ability to open help tickets and make requests to work with Technology Integration Specialists (TIS), in order to gain skills they need to use technology to both enhance learning and create quality learning experiences for all students. In addition to working directly with our TIS, the district provides many other professional development opportunities. Each year at least one PD Day is dedicated to a technology related product or service, we run two graduate level courses each year which are available to all staff, and the TIS have recorded instructional video collections for staff and students which allow them to learn/train at their own pace.

Chelmsford Public Schools employs a variety of key personnel who are tasked with providing many levels of end user support with technology. There are staff who work on everything from triaging basic help requests all the way to performing complex and engaging technology integration practices with students and staff. Ultimately, this group is focused on both enhancing teaching and learning through the use of technology and also helping all technology users meet both ISTE and MA State standards for technology use. Below are the current staff tasked with implementing the overall technology mission. This group oversees everything technology related throughout the district.

| Last Name | First Name | Role                             | Email                        | Building               |
|-----------|------------|----------------------------------|------------------------------|------------------------|
| Silver    | William    | Director of ICTS                 | silverb@chelmsford.k12.ma.us | Central Administration |
| Nehme     | David      | ICTS Network Administrator       | nehmed@chelmsford.k12.ma.us  | Central Administration |
| Drew      | Michael    | ICTS Service Manager             | drews@chelmsford.k12.ma.us   | Central Administration |
| Shin      | Dong       | District Data Management Officer | shind@chelmsford.k12.ma.us   | Central Administration |



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|             |           |                                         |                                  |                        |
|-------------|-----------|-----------------------------------------|----------------------------------|------------------------|
| Gunter      | Jordan    | Assistant Data Analyst                  | gunterj@chelmsford.k12.ma.us     | Central Administration |
| Woodman     | Tyler     | ICTS Technician                         | woodmant@chelmsford.k12.ma.us    | Central Administration |
| Turcotte    | Christian | ICTS Technician                         | turcottec@chelmsford.k12.ma.us   | Central Administration |
| Marcoux     | Jason     | ICTS Cybersecurity and Network Ops      | marcouxj@chelmsford.k12.ma.us    | Central Administration |
| Normandin   | Steven    | ICTS Technician                         | normandins@chelmsford.k12.ma.us  | CHS                    |
| Sweeney     | Marilyn   | Coordinator Technology                  | sweeneym@chelmsford.k12.ma.us    | CHS                    |
| Venugopal   | Devi      | Technology Integration Specialist       | venugopald@chelmsford.k12.ma.us  | McCarthy               |
| Panneton    | Sherri    | Technology Integration Specialist       | pannetons@chelmsford.k12.ma.us   | Parker                 |
| Salomaa     | Joanne    | Technology Integration Specialist       | salomaaj@chelmsford.k12.ma.us    | CHS                    |
| Grout       | Kristi    | Technology Integration Specialist       | groutk@chelmsford.k12.ma.us      | All Elementary         |
| O'Sullivan  | John      | Librarian/Student Help Desk Coordinator | osullivanj@chelmsford.k12.ma.us  | CHS                    |
| Weller-Fahy | Christina | Librarian                               | wellerfahyc@chelmsford.k12.ma.us | .5 McCarthy/.5 Parker  |
| Larrabee    | Terrie    | Librarian                               | larrabeet@chelmsford.k12.ma.us   | Parker                 |
| Driscoll    | Betsey    | Library Assistant                       | driscollb@chelmsford.k12.ma.us   | Byam                   |
| Berglund    | Catharina | Library Assistant                       | berglundc@chelmsford.k12.ma.us   | Center                 |
| Pimentel    | Meghan    | Library Assistant                       | pimentelm@chelmsford.k12.ma.us   | Harrington             |
| Hamm        | Maria     | Library Assistant                       | hammm@chelmsford.k12.ma.us       | South Row              |
| DeSilvio    | Christine | Library Clerk                           | desilvioc@chelmsford.k12.ma.us   | CHS                    |



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|          |          |                       |                                |            |
|----------|----------|-----------------------|--------------------------------|------------|
| Varghese | Jince    | Library Clerk         | varghesej@chelmsford.k12.ma.us | CHS        |
| Marcoux  | Victoria | Technology Instructor | marcouxv@chelmsford.k12.ma.us  | Byam       |
| Pappert  | Alyssa   | Technology Instructor | papperta@chelmsford.k12.ma.us  | Center     |
| Fidler   | Heather  | Technology Instructor | fidlerh@chelmsford.k12.ma.us   | Harrington |
| Bagni    | Kerri    | Technology Instructor | bagnik@chelmsford.k12.ma.us    | South Row  |

This group is also tasked with the continual skill building of all technology users throughout the district. To that end, this group frequently participates in professional development opportunities both inside and outside the district. They use these professional learning experiences to build their own skill set and then utilize their acquired knowledge to enhance and engage technology users throughout the district. This group is responsible for teaching classes, teaching graduate level courses, preparing and providing professional development for staff, and for building the technology skills of users throughout the district.

Support is very easy for staff and students to request. Users may enter help request tickets simply by emailing our helpdesk, and they can also call HELP (4357) from any school-based telephone. Calls are routed to the ICTS Service Manager, and if the manager is unavailable, they are forwarded to technician cell phones. If everyone is tied up, users may leave a message which automatically generates a help ticket. Help tickets are distributed to the proper technical asset and are generally dealt with very quickly. This group handles approximately 10,000 help requests per year and keeps everything technology-related running as smoothly as possible.

### **Proposed**

School network environments have evolved significantly over the past five years and will continue to advance as emerging technologies, such as artificial intelligence, data analytics, and cloud-based instructional platforms become more deeply embedded in K–12 education. A modern school network must provide not only speed, but also power, reliability, redundancy, and resilience. Nearly every instructional, operational, and life-safety function within a school building now relies on technology and, more specifically, on a robust and well-designed network infrastructure.

Instructional programs, 1:1 student devices, wireless connectivity, interactive classroom tools, security and access control systems, emergency notification systems, voice communications, and building management systems are all dependent on continuous, high-quality network performance. As such, the proposed technology plan prioritizes a strong, scalable core network



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capable of supporting current needs while remaining adaptable to future instructional models and technologies.

### **Core Network Design and Equity of Access**

At the center of the proposed design is a high-capacity core network engineered to deliver consistent, equitable access to digital resources throughout the building. The network will support a true 1:1 learning environment and ensure that all students, regardless of grade level, program, or instructional space, experience reliable connectivity. Wireless coverage will extend across classrooms, common areas, and specialized learning spaces, eliminating disparities in access and performance.

This approach aligns directly with district strategic goals related to equity and instructional consistency. By ensuring that network performance does not vary by location or usage density, the district minimizes barriers to learning and supports students who rely most heavily on school-based technology and digital services.

### **Dedicated Infrastructure and Long-Term Sustainability**

The proposed school will include dedicated data closets designed exclusively for network and communications infrastructure. Unlike legacy buildings where equipment was often housed in shared or unsuitable spaces, these rooms will be purpose-built to maintain appropriate environmental conditions, including temperature, dust control, and moisture mitigation. Proper environmental controls extend equipment lifespan, reduce maintenance issues, and support operational reliability.

All network cabling will be installed using ladder tray systems to ensure organization, traceability, and ease of future expansion. This design supports long-term sustainability by simplifying maintenance and reducing disruption when upgrades or repairs are required. Each data closet will include power receptacles connected to the building's emergency generator. Given the number of critical instructional, safety, and operational systems reliant on network availability, extended uptime during power outages is essential.

### **Network Hardware, Connectivity, and Wireless Design**

While final equipment selection will occur closer to installation to ensure the most current technology is deployed, the district has established clear performance requirements. These include network switches capable of delivering ample Power over Ethernet (PoE) to support wireless access points, security cameras, and other connected devices, as well as multi-gigabit Ethernet ports to accommodate increasing bandwidth demands.

A robust fiber-optic backbone will connect all data closets, designed with appropriate shielding and redundancy to protect signal integrity. Wireless access point placement and selection will



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account for both instructional spaces and high-density common areas, ensuring consistent performance during peak usage periods. This design supports both current instructional demands and anticipated growth in connected devices and applications.

## **Instructional Technology, Innovation, and Lifecycle Planning**

The proposed infrastructure is intentionally designed to support instructional innovation without constraining future decision-making. While many instructional platforms and tools are expected to remain consistent with current district usage, the plan recognizes that educational technology continues to evolve. High-speed, scalable connectivity enables the district to adopt new instructional tools, assistive technologies, and digital resources as teaching practices and student needs evolve.

Chelmsford Public Schools conducts a comprehensive technology steering committee review every four years to evaluate the effectiveness, equity, and sustainability of its technology program. In addition, the Information and Communication Technology Services (ICTS) Department performs ongoing analysis of tool utilization and return on investment. Technologies demonstrating sustained low usage are reviewed collaboratively with staff to determine whether additional support, modification, or replacement is warranted. This structured lifecycle approach ensures that technology investments remain aligned with instructional goals and provide meaningful value to students and educators.

## **Operational Efficiency and Safe Learning Environments**

A reliable and resilient network is foundational to maintaining a safe, secure, and supportive learning environment. Security systems, emergency notification platforms, voice communications, and building management systems all depend on continuous network connectivity. The proposed design ensures that these critical systems operate consistently across the facility, reinforcing the district's commitment to student and staff safety.

From an operational standpoint, centralized monitoring, standardized platforms, and well-designed infrastructure allow the district to manage technology efficiently and proactively. This approach supports strategic goals related to fiscal responsibility, system sustainability, and long-term planning by reducing reactive maintenance and enabling cost-effective upgrades over the building's lifecycle.

## **MEDIA CENTER/LIBRARY**

### ***Current***

Parker's current library is a modified, multi-purpose space utilized by/for a variety of programs and purposes such as library, computer science, maker-space activities, small group student breakout sessions, and interdisciplinary activities. Parker currently has one full-time licensed





## Parker Middle School Educational Program

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librarian and one part-time licensed librarian that is shared with McCarthy Middle School. Our library course is a class in the specialist rotation and follows a traditional library curriculum and serves as a resource for students to select books to check-out. The space has changed dramatically with the need to use the library for other purposes due to space constraints within Parker. The current area for library classes includes a modest section for instruction and for materials that support the curriculum and instructional needs of the various departments, as well as an interactive tv and a relatively flexible work area for students with tables and chairs.

### ***Proposed***

The District desires an educational facility that provides functionally appropriate and flexible spaces to support best instructional practices for students. The District continues to explore the function of school libraries in the 21st century and beyond and is experimenting with different delivery models and identifying ways to combine both library and computer (technology) skills for a more robust and relevant student learning experience.

Chelmsford desires to provide a standards-based Media Arts curriculum aligned with the *Massachusetts Arts Curriculum Framework* that incorporates a variety of resources determined and/or developed by the Media Arts department. Media Arts prepares students for a world accelerating into the fourth industrial revolution with real life technical skills. As this is a relatively new program, future goals include: Space that fosters community and school collaboration, awards & recognition, an internship program and industry networking for students. Through our partnership with Chelmsford Telemedia (CTM) a blend of media and broadcasting would be offered to students to expand their skills as well as prepare them for broadcasting courses offered at the high school level.

The project design should provide programmatic adjacencies and shared space that support interdisciplinary connections between STEM, computer science, and visual arts.

### Key Program Features

- Digital Citizenship, Digital Etiquette, Social Media
- Photography, Animation, Lighting
- Video, Television, Internet Broadcasting
- Audio Production, Music, Radio, Podcasting
- Graphic Design, Website Building, Media Management
- Editing, Virtual Worlds, Virtual & Augmented Reality

The District envisions a school library/media center that is more of a hybrid model learning commons, where the library/media center is a centralized hub and a portion of the space is redistributed within the general education neighborhoods, as extended learning areas in order to create a variety of at-hands-reach literacy experiences. This will allow for multi-use space in proximity to general education classrooms.



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## **VISUAL ARTS PROGRAMS** (e.g., in-classroom, specialized area, etc.)

### ***Current***

Chelmsford Public Schools provides a standards-based Visual Arts curriculum aligned to the *Massachusetts Arts and Curriculum Frameworks*. The Fine Arts department believes we are dependent on a visually literate society that has the ability to cope with multifaceted information and experiences. Students live in a society filled with increasingly complex images. The curriculum strives to foster students' confidence, creativity, and individuality, through hands-on lessons that connect to the cultures surrounding them.

### Key Program Features

- 2D - painting, drawing, printmaking, mixed media
- 3D - Sculpture/Relief, air dry clay, cardboard, plaster, fiber arts
- Discussion and Reflection - developing artist statements, digital portfolios
- Digital Art-digital renderings
- Real World Connections

All arts classes are scheduled during the school day and meet four times a week.

### ***Proposed***

The project design should provide programmatic adjacencies and shared space that support interdisciplinary connections with STEM, computer science, and media studies. Other considerations include:

- Adaptable studio space with flexible seating - communal tables, separate outward stools/standing area at windows for individual work. Space for students to work individually to enhance confidence and support focus.
- Closet/storage space: cabinets that accommodate individual classroom artwork that students can clean-up, put away and easily reach/locate. Drawers for large paper, etc.
- Kiln with proper ventilation and spacing.
- Cleaning station/counter space with sinks, as well as ample countertops to allow for drying supplies (i.e. paintbrushes, palettes, clay tools, etc.)

## **PERFORMING ARTS PROGRAMS**

### ***Current***

Chelmsford Public Schools is committed to providing students with authentic performing arts experiences that develop their musical knowledge and skills, enhance their self-esteem, and contribute to their development as consumers and appreciators of the performing arts and their place in society today and in the future. Chelmsford offers Band, Chorus, Orchestra, and General Music, all of which are built upon a standards-based curriculum aligned to the *Massachusetts Arts Curriculum*. There are multiple concerts both during and after the school



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day for school and the general community to attend where students showcase their talents. The schools also have a robust after-school theater program with multiple performances to allow all students interested in participating the chance to do so.

### Key Program Features

- The Band, Chorus, and Orchestra programs provide students with authentic educational opportunities to develop and demonstrate their skills on their instrument(s) of choice or develop their vocal skills as individual performers and as a member of an ensemble.
- The Theater program provides students with authentic educational opportunities to develop and demonstrate their skills in all aspects of theater performance and production.

### ***Proposed***

The project design should provide appropriate instructional and performance space that meets the specific needs of this type of programming while also being adaptable within the framework of performing arts.

Performance spaces (cafetorium, Blackbox theater/ensemble room/digital media studio): It is important to note that the current grade 7-8 middle school (McCarthy) includes an auditorium that has been an important component of our strong theater program. This space has served as an instructional space during the day for theater classes and as a rehearsal and performance space for the numerous shows that are produced each year. As such, consideration should be given to designing space/spaces that are conducive to teaching and producing theater. Other considerations include:

- Rehearsal/classroom spaces for each discipline/course (band, chorus, orchestra, theater). Consideration should be given to the development of a performance music/ensemble room that could accommodate the band, orchestra, and choral program.
- Additionally, the design should include space for our offerings such as music appreciation courses for non-performance students.
- The integration of digital media with our community TV programming.
- Spaces for storage (instruments, equipment, costumes and props), theater technology, workshop (design build), and a green room.
- Performing arts wing or section to foster collaboration/interdisciplinary work.

Chelmsford has the unique situation of housing Chelmsford Telemedia (CTM) in the current Parker Middle School. CTM partners with our schools for theater performances. A digital media student studio would serve a dual purpose as black box theater and tv studio as part of the media/performance curriculum. The combination TV studio and black box theater is a flexible instructional space designed to support the district's media arts and performing arts curriculum while promoting intentional integration between the school theater program and Chelmsford



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Telemedia. The space provides students with hands-on, authentic learning experiences aligned with the *Massachusetts Arts Curriculum Frameworks*.

As a shared instructional environment, the space supports broadcast media production, digital storytelling, acting, technical theater, and live performances. Its flexible configuration allows students to collaborate across disciplines, develop industry-relevant technical and creative skills, and apply learning through real-world production experiences, including filming performances and producing school and community programming.

This combined space maximizes instructional flexibility, supports Universal Design for Learning (UDL), and strengthens connections between the school and the broader community while efficiently leveraging shared resources.

In Parker's grade 5-6 music program, students select one music option: band, chorus, orchestra, or general music. All four programs run concurrently during designated blocks on Monday, Tuesday, Thursday, and Friday. Each block includes one section of each ensemble/class.

Sections accommodate up to 75 students. Larger classes include an additional staff member who conducts sectional rehearsals with smaller groups of students.

Number of performing arts sections for each design configuration are as follows:

### Number of Music Sections Per Grade Level By Week: Current Grade 5 and 6 Building

|               | Grade 5 | Grade 6                     |
|---------------|---------|-----------------------------|
| Band          | 12      | 12                          |
| Chorus        | 12      | 12                          |
| Orchestra     | 12      | 12                          |
| General Music | 12      | 12                          |
|               |         | <b>Total all grades: 96</b> |

### Number of Music Sections Per Grade Level By Week: Projected Grades 4-6

|               | Grade 5 | Grade 6 | Grade 4                      |
|---------------|---------|---------|------------------------------|
| Band          | 12      | 12      | 12                           |
| Chorus        | 12      | 12      | 12                           |
| Orchestra     | 12      | 12      | 12                           |
| General Music | 12      | 12      | 12                           |
|               |         |         | <b>Total all grades: 144</b> |



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## PHYSICAL EDUCATION PROGRAMS

### ***Current***

Chelmsford Public Schools provides a standards-based Health and Physical Education curriculum aligned with the *Massachusetts Health Curriculum Framework*. Chelmsford students are provided with experiential and authentic learning experiences related to the world of health and wellness. Students focus on adolescent health related issues, social emotional awareness, and an appreciation for lifelong fitness. Currently, we are running four classes of physical education at a time in an undersized gymnasium for the number of assigned students.

### Key Program Features

- Goal setting, decision making and self- advocacy
- Interpersonal communication and relationships
- Substance abuse awareness
- Physical fitness
- Tactical and conceptual Gaming
- Teamwork and communication
- Individual skill development

### ***Proposed***

The project design should provide programmatic adjacencies and shared spaces for health and physical education that promote the integration of instruction and practical application of skills. Other considerations include:

- A large, unobstructed gymnasium with the ability to divide classes into sections through the use of partition walls or nets is crucial in maximizing the space available and providing a variety of different options for students.
- A separate weight room/physical fitness area from the gymnasium to allow students more opportunities to engage in different forms of physical fitness
- Wellness suite/hall: Health classrooms that are in close proximity to the gymnasium which includes shared flexible space
- A separate storage area for equipment
- Locker rooms/changing facilities: The middle school currently has traditional boys' and girls' locker rooms. While they are antiquated and are lacking in functionality, they are used during and after school in a variety of ways. The locker rooms are used by students who participate in youth recreation programs that use the facility after school hours. Additionally, we have reduced the size of the locker rooms since our students are not showering after physical education classes and only providing space for students to change for class as needed and to function as team rooms for any organized sport



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programs. We are reallocating space to the main gym to accommodate for the Adaptive Physical Education (APE) classes. In addition, as we think about the community benefits of this project, and the possibility of increased community usage, the inclusion of locker rooms/changing facilities may be worthy of consideration.

Our gym is used extensively by the community basketball program, Chelmsford Youth Basketball League (CYBL), and Chelmsford Youth Wrestling. Since Chelmsford does not have middle school sports, these programs provide basketball and wrestling programming for all children from kindergarten through grade 8 and are highly subscribed by the families in Chelmsford.

Number of health and physical education sections for each design configuration are as follows:

## **Health Education**

### **Current Grade 5-6 Health Education Sections (Total - 34 sections):**

- Classroom #1 - Health Teacher #1 - 18 sections plus
- Classroom #2 - Health Teacher #2 - 16 sections plus

### **Reconfigured Grade 4-6 Health Education Sections (Total - 52 sections):**

- Classroom #1 - Health Teacher #1 - 24 Health classes
- Classroom #2 - Health Teacher #2 - 24 Health classes
- Classroom #3 - Health Teacher #3 - 4 Health Classes

### **Reconfigured Grade 5-8 Health Education Sections (Total - 68 sections):**

- Classroom #1 - Health Teacher #1 - 20 Health classes
- Classroom #2 - Health Teacher #2 - 20 Health classes
- Classroom #3 - Health Teacher #3 - 20 Health Classes
- Classroom #4 - Health Teacher #4 - 8 Health Classes

## **Physical Education**

### **Current Grade 5-6 Physical Education Sections (Total - 73 sections):**

- PE Teacher #1 - 22 + 3 APE Classes
- PE Teacher #2 - 22 + 2 APE Classes
- PE Teacher #3 - 22 + 2 APE Classes





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### **Reconfigured Grade 4-6 Physical Education Sections (Total - 118 sections) :**

- PE Teacher #1 - 24
- PE Teacher #2 - 24
- PE Teacher #3 - 24
- PE Teacher #4 - 24
- PE Teacher #5 - 8 + 14 APE classes (22 classes total)

### **Reconfigured Grade 5-8 Physical Education Sections (Total - 156 sections):**

- PE Teacher #1 - 24 + 2 APE
- PE Teacher #2 - 24 + 2 APE
- PE Teacher #3 - 24 + 2 APE
- PE Teacher #4 - 24 + 2 APE
- PE Teacher #5 - 24 + 2 APE
- PE Teacher #6 - 19 + 7 APE

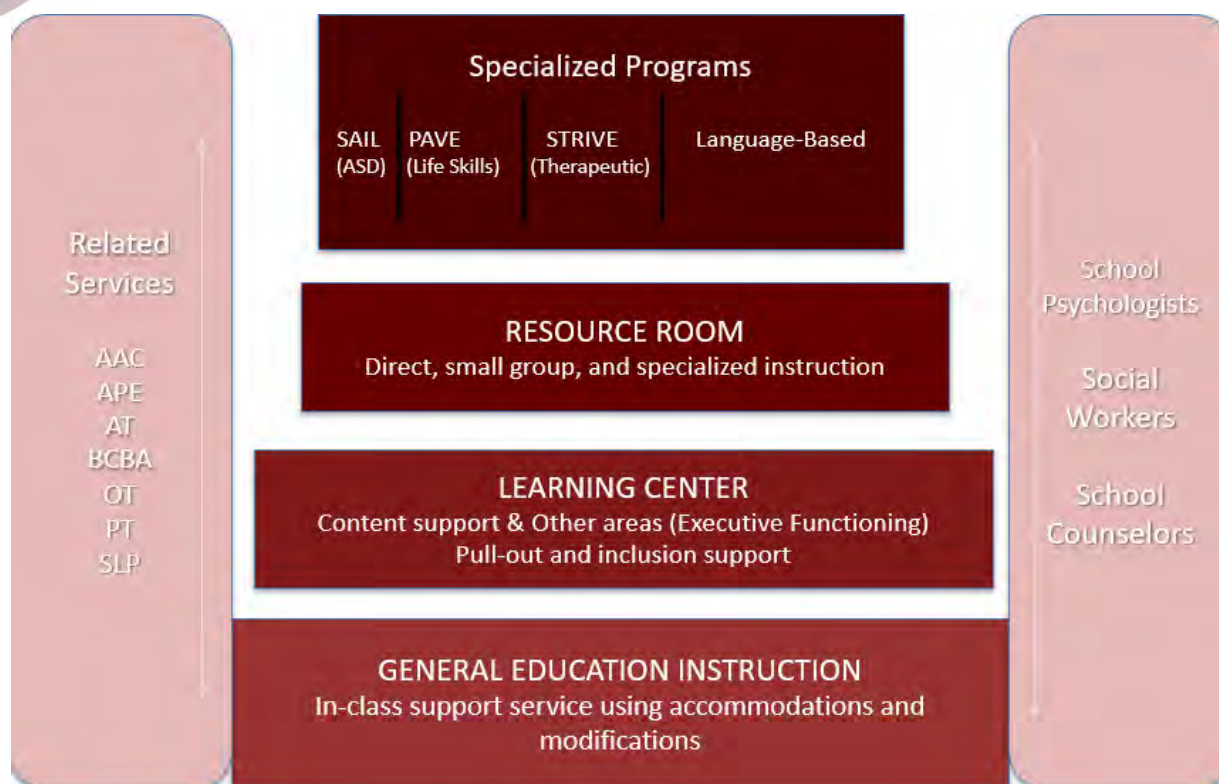
## **SPECIAL EDUCATION PROGRAMS**

### ***Current:***

The Chelmsford Public Schools adheres to federal and state laws that guarantee the rights of all students' access to the general education curriculum. The District remains focused on maximizing inclusive learning opportunities that address the academic, social and emotional needs of middle school learners. The District's philosophy is to embrace the inclusion of students with disabilities in all aspects of school life. The District has made significant investments in the development of in-district programming over many years to actualize the commitment for inclusion. The special education department strives to continue to develop and strengthen programming that maximizes learning opportunities for all students within the inclusive classroom with a focus on skill development: social emotional learning, language-based instruction, and writing/reading across the curriculum. Consistent access to technology is provided to foster student independence in accessing accommodations.



# Parker Middle School Educational Program



The continuum of special education services range from full inclusion in the general education setting with learning center services, resource room services, specialized programs and related services. Differentiated learning models are provided to those students who may require additional support outside of the inclusion model.

## Key Features of Special Education Programming:

- Full Inclusion: General Education Instruction
  - Co-teaching (special education teacher and general education teacher)
  - Push-in Support: paraeducator
  - Push-in Related Services: speech-language, OT, PT,
- Learning Center Services:
  - primarily inclusion-based services (co-teaching or push-in support)
  - small group specialized instruction for one class period to support academic, study and/or executive functioning skills.
- Resource Room Services:
  - Direct small group specialized instruction in content areas as well as study skills/executive functioning skills.
  - Inclusion in the general education class with support from a paraeducator in science and social studies



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- **Specialized Programs:**
  - SAIL - Autism Spectrum Disorder (ASD) - substantially separate with opportunities for inclusion, discrete trial specialized curriculum.
  - PAVE – Lifeskills - substantially separate program with opportunities for inclusion.
  - STRIVE - Social-Emotional Therapeutic Program - combination of small group pull-out and inclusion.
  - Language Based Program - students with specific learning disabilities in reading and writing. Combination of small group specialized instruction and inclusion with language-based accommodations and modifications.
- **Related Services:**

Related services are provided within all levels of the district's special education programming within full inclusion to one of our specialized programs. Related services consist of speech and language, occupational therapy (OT), physical therapy (PT), assistive technology (AT), augmentative and alternative communication (AAC), vision services, and hearing services. Behavioral supports are provided primarily in a consultative model to school-based teams by Board Certified Behavior Analysts (BCBAs).
- **Mental Health/School Counseling:**

The district has rich mental health/school counseling support services available throughout all special educational programming.

Special education services are provided to eligible students and are designed to remediate deficit areas, support the development of new skills, and allow students to gain the skills to access the general education curriculum in the least restrictive environment.

Students are included in the general education classrooms with a combination of support from special educators, related service providers, and paraeducators. There is a focus on inclusion, where students with IEPs spend most of their day in general education classrooms with supports like co-teaching, paraeducator support, a combination of push-in/pull-out services, accommodations, and therapies integrated into the regular curriculum, aiming for grade-level

progress with tailored support, rather than complete separation, fostering social skills and belonging. In the general education classrooms, students participate in grade-level lessons (math, science, ELA, social studies) with accommodations like graphic organizers, modified assignments, or a peer buddy, supported by a dedicated staff member. In the Resource Room,



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students may receive pre-teaching for upcoming lessons, intensive small-group content area (reading, writing, math) instruction, review content material from the general education curriculum, and/or work on executive functioning skills such as planning and organization. The goal is to keep students in the inclusion setting as much as possible to build social skills, confidence, and access to rigorous academics, while ensuring they meet their goals.

The services and staffing available at Parker Middle School are allocated annually based on the service delivery needs identified on the Individualized Education Plans (IEPs) of the special education population being served. Currently, Parker Middle School serves 180 students with documented special needs.

Chelmsford Public Schools remains focused on meeting the unique learning needs of our students by providing necessary related services that support skill development and maximize learning opportunities. Services and support are provided by a variety of professionals in a variety of settings. Parker Middle School currently has nine (9) special education teachers that provide inclusion, learning center and resource room services: two (2) special education teachers for our language based program, one (1) special education teacher for the STRIVE therapeutic program, one (1) severe special education teacher for the SAIL (autism) program, and one (1) severe special education teacher for the Lifeskills - PAVE program. In addition, Parker Middle School has two (2) school counselors, one (1) social worker, two (2) school psychologists, one (1) Board Certified Behavior Analyst (BCBA), one part-time occupational therapist (OT), two (2) speech and language therapists, and one part-time Physical Therapist.

### Current Programs and Services as of December 2025

Parker Middle School

Current Student Population: 814 students

Current Special Education Student Population: 180 students

| Program                    | Number of Rooms | Students Per Class | Total Students | Number of FTE |
|----------------------------|-----------------|--------------------|----------------|---------------|
| Learning Center/ Inclusion | 7               | 6-10               | 120            | 7.0           |
| Resource Room              | 2               | 6-10               | 24             | 2.0           |
| Language Based Program     | 2               | 4-8                | 11             | 2.0           |
| STRIVE                     | 1               | 4-8                | 12             | 1.0           |
| SAIL                       | 1               | 8                  | 8              | 1.0           |



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|                      |              |     |    |                                              |
|----------------------|--------------|-----|----|----------------------------------------------|
| PAVE- Lifeskills     | 1            | 5   | 5  | 1.0                                          |
| Occupational Therapy | Shared space | 1-3 | 23 | Part-time based on caseload<br>0.3           |
| Speech               | 2            | 1-5 | 92 | 2.0                                          |
| Physical Therapy     | Shared space | 1-2 | 3  | Part-time based on caseload—currently<br>0.1 |
| BCBA                 | Shared space | 1-2 | 40 | 1.0                                          |

### Program Models:

#### *Learning Center Program: All middle school grade levels (4 through 8)*

Students receiving support through the Learning Center model have mild to moderate learning needs including but not limited to specific learning disabilities, communication disabilities, autism spectrum disorder, and/or health impairments. Learning Center teachers may support students in the general education classroom and/or through a consultation model. Learning Center teachers provide specialized instruction in a wide range of areas, including reading, language arts, mathematics, academic support in curriculum areas (science and social studies) as well as study, executive functioning and organizational skills. Teachers collaborate closely with classroom teachers and related service providers to develop comprehensive, integrated services for children.

The focus of the program is to directly instruct foundation skills as well as provide learning strategies to help students compensate for area(s) of disability while working towards grade level standards. Additional components of this teaching model include assisting students in understanding their own strengths and weaknesses as learners and developing key self-advocacy skills in their learning environment.

Curriculum: Students who receive support through the Learning Center access the grade level general education curriculum through direct skill-based instruction, accommodations and some modifications. Learning Center teachers may use specially designed instructional materials.



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Staffing: There is a special education teacher (DESE licensed) fulfilling this role at Parker Middle School with paraeducator support, as needed.

### Resource Room - All middle school grade levels (4 through 8)

Students receiving support through the Resource Room model at the middle school level have moderate learning needs including but not limited to specific learning disabilities, communication disabilities, health impairments, sensory impairments, autism spectrum disorders, and/or neurological disabilities. Resource Room special education teachers and paraeducators support students in special education settings outside the general education classroom using replacement specialized curriculum. This curriculum may target reading, language arts, including writing, mathematics, and academic support. Students may be supported through direct, small group specialized instruction, and/or through a consultation model to general education teachers. The students may also be supported within the general education setting to generalize skills. Resource Room teachers collaborate closely with classroom teachers, therapists and other specialists to develop comprehensive, integrated services for children.

The focus of the program is to teach foundation skills in order to make effective progress in key educational areas. Students are working toward grade level benchmarks through a modified curriculum. Additional components of this teaching model include assisting students in understanding their own strengths and weaknesses as learners and developing key self-advocacy skills in their learning environment.

Curriculum: Students who receive support through the Resource Room benefit from the use of specialized replacement curriculum and specially designed instruction. Language Live is the specialized curriculum used for the English Language Arts small group resource room pull-out setting. TransMath is the specialized curriculum utilized in the math small group resource room pull-out setting.

Staffing: Special education teacher (DESE licensed) and paraeducator support, as needed. Related Services are provided based on a student's unique IEP needs.

The Parker Middle Schools currently houses the following specialized programs servicing students in grades 5 and 6:





## Parker Middle School Educational Program

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|                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| STRIVE Program: Therapeutic Program                  | This program provides a highly structured, therapeutic environment with integrated clinical services (like counseling, behavior regulation) and specialized teaching for students whose emotional, social, or behavioral needs significantly impact their ability to access their education. Students receive small group academic instruction as determined by their individual needs. In addition, students are included in general education classes with support from ABA trained staff when appropriate. This program emphasizes direct instruction in emotional regulation, coping skills, and social-emotional growth alongside academics. |
| SAIL Program: Autism Spectrum Disorder Program (ASD) | This program provides support services for students with <u>Autism Spectrum Disorder</u> . The program uses specially designed instruction including discrete trial for students with ASD. Services may include a variety of therapies and accommodations, such as speech therapy, occupational therapy, physical therapy, and visual aids, to help students succeed in their education.                                                                                                                                                                                                                                                          |
| Language-Based Learning Program                      | This program provides specialized instruction in reading (such as Orton Gillingham - OG) along with other literacy supports for students with language-based learning disabilities in reading and writing. Language based accommodations are provided through all content area classes.                                                                                                                                                                                                                                                                                                                                                           |
| PAVE Program: Functional Lifeskills Program          | This program has a focus on functional skills for students with intellectual and multiple disabilities. Instruction is provided to include functional academics, communication skills, activities for daily living (ADLs), motor skills,                                                                                                                                                                                                                                                                                                                                                                                                          |



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|  |                                                                                                                                                                                                                                                            |
|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | independence, community integration, and prevocational skills. The program includes skills like personal care, cooking, money management, functional reading and writing, social interaction, and job readiness, rather than solely traditional academics. |
|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Chelmsford does not have any Collaborative spaces/programs located within the Parker Middle School.

### Current Program Challenges:

There are a number of challenges that impact the existing special education programming with the current school building. Overall, there is a lack of space for special educational programming. Many of the seven (7) learning center special education teachers share smaller size classroom spaces. The learning center and resource room serve 6-10 students at a time. While often the schedule may allow for special education teachers to have shared smaller classroom spaces for their group of students in the pull-out setting at a time, there are times when both teachers need to hold small group instruction in the shared space at the same time. The smaller learning center/resource room class spaces are not conducive to holding two (2) separate pull-out instruction classes at the same time without significant distraction for students.

Another challenge is limited breakout spaces in order to support push-in services. When the inclusion based/learning center special education teachers need to pull a small group of students to target a skill or review content instruction from the inclusion class, there is not a small space nearby to accommodate instruction. Often, they need to pull students aside within the already undersized general education classroom, or back of the classroom, or to the shared learning center classroom if the space is available. However, the shared learning center space is not necessarily near the general education class. This requires additional transition time.

Space constraints also impact our substantially separate specialized programs. Each specialized program has a classroom space dedicated to each program; however, the layout and size of the class space is not adequate for the type of programming and number of students. The SAIL (ASD), PAVE (Lifeskills) and STRIVE (therapeutic) programs have a number of adults supporting students in those programs as well as paraeducators in addition to the special education teacher. The students in these specialized programs require adult support throughout the school day (1:1 or 2:1 ratio of students to adults). This makes the small class space more challenging for learning. Another challenge is the PAVE (Lifeskills) and SAIL (ASD) programs do not have access to a kitchen/prevocational space for learning. Students in these programs have goals that focus on Activities of Daily Living (ADLs) and prevocational skills. While instruction occurs focusing on these goal areas, it is challenging in the current class space to effectively execute lessons targeting these goals.



## Parker Middle School Educational Program

The related services providers also share spaces with the exception of the speech language therapists. These shared spaces as well as the separate speech spaces are small and not ideal for the specialized related service instruction. The SLPs each have a small room where they can accommodate 2-4 students in a group at a time. The OT and PT share a very small office type space at Parker. The OT and PT mostly push into the specialized program classrooms to provide their therapy services within the specialized program classroom or pull smaller numbers of students one-to-one because the space is not conducive to conducting small motor groups with more than 1 student. PT has also utilized the hallways when working on gross motor skills at times. Additionally, there is no designated space for OT/PT equipment. The BCBA has a small desk space located within the STRIVE therapeutic program classroom despite working to support students in the various specialized programs and non-specialized program special education students in the school that require behavioral consult or support.

### SPECIAL EDUCATION RUBRIC AND REGULATIONS

| Question                                                                                                                                          | Yes/No or Comment                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ensuring Access                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 1. Do the facilities and classrooms for eligible students maximize their inclusion into the life of the school?                                   | No. A new or renovated school facility would support a wider distribution of support classrooms to maximize inclusion into the life of the school. The current facilities have class and program spaces that are too small. The location of some of the spaces are not in close proximity to the general education grade level classes. A new or renovated school would provide ample space and allow for the location for each special education class to be located near the students' general education peers which would maximize the inclusion into the life of the school. |
| 2. Do all eligible students have access to school facilities including, but not limited to, those areas necessary to implement the student's IEP? | Yes, eligible students have access to school facilities including the areas necessary to receive their IEP services and implement the IEP, however, the spaces they have access to for the services are small and require time to transition to spaces further away in the building which specifically impacts students with physical disabilities and/or mobility challenges. While there is an elevator at the Parker Middle School it is cumbersome and presents challenges for ease of use given that it is located outside the building.                                    |



## Parker Middle School Educational Program

|                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                         |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3. Are resource rooms and separate classrooms for students with disabilities given the same priority as general education programs for access to and use of instructional and other space in public schools?                                                   | Yes                                                                                                                                                                                                                                                                                                     |
| 4. Is the school providing whatever equipment and making whatever physical adaptations are necessary, including acoustical and lighting treatments to remove physical communication barriers for students who are visually impaired, deaf, or hard of hearing? | Yes, however, a new or renovated school facility would offer greater availability of adaptive resources to all students. The current school building has significant challenges to acoustical sound despite providing materials to address hearing needs in the necessary learning spaces for students. |
| Ensuring Equality                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                         |
| 5. Are the facilities and classrooms serving only students with disabilities at least equal in all physical respects to the average standards of general education facilities and classrooms?                                                                  | Yes, however, the current average standards of general education facilities and classrooms are below recommended MSBA standards.                                                                                                                                                                        |
| Minimizing Stigmatization                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                         |
| 6. Specifically, does the plan place a classroom serving only older students with disabilities in a part of the school building in which all the classrooms are occupied by elementary school students? Vice versa? (if yes, it's a violation)                 | No. The current school services students in only two grades (5th and 6th). All students in the school are within 2 years of each other.                                                                                                                                                                 |
| 7. Does the plan place all, or a significant proportion, of special education facilities together in one part of a school building? (if yes, it's a violation)                                                                                                 | No. A new or renovated school facility would ensure locations of facilities used to deliver special education services are distributed throughout the school building.                                                                                                                                  |
| 8. During a school construction project, is the plan to move classrooms of students with disabilities to locations apart from the general education program? (if yes, it's a violation)                                                                        | No.                                                                                                                                                                                                                                                                                                     |
| 9. Is the plan to place a sign saying "special class" or "resource room" on the front of a substantially separate classroom? (if yes, it's a violation)                                                                                                        | No.                                                                                                                                                                                                                                                                                                     |



## Parker Middle School Educational Program

### ***Proposed***

#### Anticipated Staffing Changes for the Three Proposed Building Scenarios

The current special education programming at Parker Middle School will continue to be required for all three options of the proposed new building or renovation projects (5-6, 4-6 and 5-8). All three configurations will need to include the following specialized programs: SAIL (autism), PAVE - Lifeskills, STRIVE - therapeutic, and Language Based. The number of each special education program type and specialized program classrooms will vary depending on the grade configuration and the increased number of students attending Parker in each scenario.

### **Current Grade 5-6 Option**

In this scenario where Parker Middle School is renovated or a new building is constructed for grades 5-6 as is the current school configuration, the school population is projected to increase from the current 814 students to 930 students at the highest enrollment. The average special education eligibility rate in the district is 21.1%. Assuming this ratio remains constant, Parker Middle School is projected to have 196 students who will require special education services at an enrollment of 930 students. Additionally, the district has a significant increase in students in the SAIL (ASD) program at the current preschool and elementary levels (PK-4). Currently, there are 22 students in the SAIL (ASD) program at the elementary level (current K-1). This is 14 additional students requiring the SAIL program than are currently at Parker Middle School now. It is anticipated that two (2) additional substantially separate SAIL program classrooms for a total of three (3) would be needed. The projected number of students in the PAVE (Lifeskills), STRIVE (therapeutic) and Language Based programs are projected to remain at one (1) classroom per program which is the same as the current programming based on the current preschool and elementary program numbers. To summarize, given the increase of 116 students (814 current student population to the projected highest enrollment of 930), it is projected that 210 students will be eligible for special education services. The projected 210 students requiring special education services is based on the district eligibility rate of 21.1% (196 students) along with the additional students enrolled in the SAIL (ASD) program (14 students) at the elementary level. See the chart below for the projected FTE increase and distribution.

Projected: Parker Middle School - Grades 5-6

Projected Future Population: 930

Projected Special Education Student Population: 210 students

| Program                    | Number of Rooms | Students Per Class | Total Students | Number of FTE |
|----------------------------|-----------------|--------------------|----------------|---------------|
| Learning Center/ Inclusion | 8               | 6-10               | 129            | 8.0           |
| Resource Room              | 2               | 6-10               | 25             | 2.0           |



## Parker Middle School Educational Program

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|                      |                   |     |     |                                           |
|----------------------|-------------------|-----|-----|-------------------------------------------|
| Language Based       | 2                 | 4-8 | 14  | 2.0                                       |
| STRIVE               | 1                 | 4-8 | 12  | 1.0                                       |
| SAIL                 | 3                 | 8   | 22  | 3.0                                       |
| PAVE - Lifeskills    | 1                 | 6-8 | 8   | 1.0                                       |
| Occupational Therapy | 1                 | 1-3 | 30  | Part-time based on caseload 0.8           |
| Speech               | 3                 | 1-5 | 110 | 3.0                                       |
| Physical Therapy     | 1<br>(motor room) | 1-2 | 6   | Part-time based on caseload—currently 0.2 |
| BCBA                 | 1                 | 1-2 | 45  | 1.2                                       |

### Reconfigured Grade 4-6 Option:

In this scenario where Parker Middle School is renovated or a new building is constructed for grades 4-6, the school population is projected to increase from the current number of 814 (current Parker population) students to 1,390 students at the highest enrollment. The average special education eligibility rate in the district is 21.1%. Assuming this ratio remains constant, Parker Middle School for grades 4-6 is projected to have 293 students who will require special education services at an enrollment of 1,390 students. Additionally, the district has a significant increase in students in the SAIL (ASD) program at the current preschool and elementary levels (PK-4). Currently, given the SAIL increased program numbers at the preschool and elementary level, it is anticipated that (4) substantially separate SAIL program classrooms will be needed for grades 4 through 6. The projected number of students in the PAVE (Lifeskills) and STRIVE (therapeutic) program classrooms will need to increase to two (2) classes for each program. The Language Based programs are projected to remain at one (1) classroom per grade level which would increase the Language Based program to require three (3) classes. To summarize, given the increase of 576 students (814 current student population to the projected highest enrollment of 1,390), it is projected that 293 of the total new population of 1,390 students will be eligible for special education services. See the chart below for the projected FTE increase and distribution.

Projected: Parker Middle School - Grades 4-6

Projected Future Population: 1,390

Projected Special Education Student Population: 293 students





## Parker Middle School Educational Program

| Program                    | Number of Rooms   | Students Per Class | Total Students | Number of FTE |
|----------------------------|-------------------|--------------------|----------------|---------------|
| Learning Center/ Inclusion | 12                | 6-10               | 170            | 12.0          |
| Resource Room              | 3                 | 6-10               | 35             | 3.0           |
| Language Based Program     | 3                 | 4-8                | 21             | 3.0           |
| STRIVE                     | 2                 | 4-8                | 20             | 2.0           |
| SAIL                       | 4                 | 8                  | 32             | 4.0           |
| PAVE - Lifeskills          | 2                 | 6-8                | 15             | 2.0           |
| Occupational Therapy       | 2                 | 1-3                | 40             | 1.3           |
| Speech                     | 4                 | 1-5                | 146            | 3.5           |
| Physical Therapy           | 1<br>(motor room) | 1-2                | 10             | 0.3           |
| BCBA                       | 2                 | 1-2                | 64             | 1.6           |

### Reconfigured Grade 5-8 Option:

In the scenario where the Parker Middle School is renovated or constructed for grades 5-8, the school population is projected to increase from the current number of 814 (current Parker population) students to 1,885 students at the highest enrollment. The average special education eligibility rate in the district is 21.1%. Assuming this ratio remains constant, Parker Middle School for grades 5-8 is projected to have 398 students who will require special education services at an enrollment of 1,885 students. Additionally, the district has a significant increase in students in the SAIL (ASD) program at the current preschool and elementary levels (PK-4). Currently, given the SAIL increased program numbers at the preschool and elementary level, it is anticipated that five (5) substantially separate SAIL program classrooms will be needed for grades 5-8. The projected number of students in the PAVE (Lifeskills) program will require two (2) substantially separate classrooms. The STRIVE (therapeutic) program classrooms will need to increase to three (3) in order to support students with emotional disabilities at the middle school level. The Language Based programs are projected to remain at one (1) classroom per grade level which would increase the Language Based program to require four (4) classrooms. To summarize, given the increase of 1,071 students (814 current student population to the projected highest enrollment of 1,885), it is projected that 398 of the total new population of 1,885 will be eligible for special education services. See the chart below for the projected FTE increase and distribution.



## Parker Middle School Educational Program

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Projected: Parker Middle School - Grades 5-8

Projected Future Population: 1,885

Projected Special Education Student Population: 398 students

| Program                    | Number of Rooms   | Students Per Class | Total Students | Number of FTE |
|----------------------------|-------------------|--------------------|----------------|---------------|
| Learning Center/ Inclusion | 15                | 6-10               | 238            | 15.0          |
| Resource Room              | 4                 | 8-12               | 48             | 4.0           |
| Language Based Program     | 4                 | 4-8                | 28             | 4.0           |
| STRIVE                     | 3                 | 4-8                | 24             | 3.0           |
| SAIL                       | 5                 | 8                  | 40             | 5.0           |
| PAVE - Lifeskills          | 2                 | 6-8                | 20             | 2.0           |
| Occupational Therapy       | 2                 | 1-5                | 52             | 1.5           |
| Speech                     | 5                 | 1-5                | 200            | 5.0           |
| Physical Therapy           | 1<br>(motor room) | 1-3                | 18             | 0.6           |
| BCBA                       | 2                 | 1-2                | 88             | 2.0           |

### EXTENDED DAY PROGRAMMING

The Chelmsford Public Schools provide a tuition-based before- and after-school Extended Day Program for children enrolled in the District. The program is open every day that school is in session as well as on select no-school days for an additional fee. The Before-School program begins at 7:00 a.m. The After-School program is open from dismissal to 6:00 p.m. The extended day program is housed at Parker Middle School and each elementary school.

The extended day program at Parker Middle School serves a relatively small number of children (approximately 21 students). The elementary student figures below only include grade 4 students currently enrolled in the before school extended day program.



## Parker Middle School Educational Program

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| Before School Extended Day Site | # of students enrolled |
|---------------------------------|------------------------|
| Parker Middle School            | 2                      |
| Byam Elementary School          | 7                      |
| Center Elementary School        | 3                      |
| Harrington Elementary School    | 3                      |
| South Row Elementary School     | 6                      |

The After-School program serves approximately 70 students:

| Before School Extended Day Site | # of students enrolled |
|---------------------------------|------------------------|
| Parker Middle School            | 22                     |
| Byam Elementary School          | 11                     |
| Center Elementary School        | 9                      |
| Harrington Elementary School    | 14                     |
| South Row Elementary School     | 14                     |

The Extended Day Program provides opportunities for children to participate in a variety of activities such as arts and crafts, dramatic play, group games, sports, cooking, and science activities. The program also provides quiet spaces for reading and completing homework. To do so, the program uses a combination of dedicated Extended Day space, as well as shared classrooms and public spaces such as the gym, cafeteria, art and music rooms, library, athletic fields, and playgrounds. The Extended Day Program is overseen by a director and has dedicated site coordinators.

### ***Proposed***

Based on the design-enrollment and site location of the preferred grade level enrollment configuration identified in the next stage, the catchment areas and drop-off/pick-up methods associated with the Extended Day program may change.

Each of the options explored should include a dedicated office suite for the Extended Day program, located near but not within the building's main administrative offices and appropriate storage for program equipment and supplies.



# Parker Middle School Educational Program

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## VOCATIONS & TECHNOLOGY PROGRAMS

### Non-Chapter 74 Programming

#### *Current*

The skills students acquire through this curriculum go far beyond “learning to code.” Students learn to think critically, solve complex problems, communicate effectively with technology, create digital artifacts, understand data, and behave responsibly in digital spaces. These capacities strengthen performance across all disciplines, mathematics, science, writing, and the arts, while developing the foundational digital fluency expected in Massachusetts schools.

Today, only Grades 5 and 6 are located at Parker. In the newer, larger Parker School, Grade 4 can be accommodated for the addition of a grades 4-6 configuration, and the Digital Literacy and Computer Science (DLCS) work that Grade 4 students accomplish will be more sophisticated with higher expectations. They will move from a self-contained classroom with weekly pull-out to experience collaborative learning in technology spaces and collaborative spaces between classrooms. There will be more cross-curricular work between the DLCS teacher and classroom teachers utilizing the new collaborative spaces. Students begin content work on a project in the classroom, come to Computer Literacy class where they will learn digital tools to support and enhance their work, then return to either a collaborative space or their classroom to complete the content work. The collaborative spaces will also accommodate cross-grade-level work when appropriate.

Currently, all grade K-8 students participate in the Project Lead the Way curriculum to develop introductory skills in Computer Science and hands-on engineering projects. This will continue throughout all the grade levels in the new Parker School, and the larger technology rooms will accommodate additional student projects. Additional industry connections may be made and shared across classrooms to accommodate a larger number of students involved in each industry visit.

Massachusetts was among the first states to formally establish K–12 Digital Literacy and Computer Science Standards, signaling the state’s commitment to preparing students for a rapidly evolving, technology-driven world. The DLCS standards emphasize four interconnected strands:

1. Computing and Society
2. Digital Tools and Collaboration
3. Computing Systems
4. Computational Thinking



## Parker Middle School Educational Program

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### ***Proposed***

A dedicated Grade 4–6 course will allow students to explore all four strands through hands-on, age-appropriate, project-based learning. These years are a crucial developmental stage: students are ready for creative exploration, collaborative problem-solving, and deeper reasoning, yet still are open, curious, and unafraid of new concepts. Introducing computer science now ensures equity of opportunity before stereotypes and self-doubt emerge in later grades.

This initiative also directly supports district goals related to STEM readiness, information literacy, digital citizenship, and equitable access to high-quality learning experiences.

A DLCS Course for Grade 4–6 students combines digital literacy, computer science foundations, and interdisciplinary application. Students will:

- Develop the ability to break large problems into smaller steps, design algorithms, and test solutions (DLCS: Computational Thinking).
- Use block-based programming tools to create stories, games, simulations, and generative art (DLCS: Computational Thinking; Digital Tools and Collaboration).
- Explore how computers, sensors, and networks work through hands-on physical computing and introductory robotics (DLCS: Computing Systems).
- Build responsible and ethical digital habits; privacy, respectful communication, intellectual property awareness, and evaluating online information (DLCS: Computing and Society).
- Learn tools that will strengthen mathematical and scientific reasoning (DLCS: Computational Thinking; Digital Tools and Collaboration).

The course uses accessible platforms such as the Project Lead the Way portal, Versions of Scratch, Code.org, micro:bit, and MIT App Inventor, as well as collaborative digital tools already familiar to Massachusetts educators.

### **Direct, Strand-by-Strand Alignment**

- **Computing and Society:**  
Students analyze how technology impacts daily life, learn positive on-line behavior, and explore digital ethics, privacy, and cyber safety. These topics meet DLCS expectations for ethical participation in digital environments.
- **Digital Tools & Collaboration:**  
Students use digital tools to create original multimedia products, collaborate with peers,



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give and receive feedback, and present digitally. These activities support DLCS standards related to communication, collaboration, and digital creation.

- **Computing Systems:**  
Through physical computing (i.e., micro:bit) and classroom technology, students learn how inputs, processing, and outputs work and gain a concrete understanding of devices and networks at an age-appropriate level.
- **Computational Thinking:**  
Students practice decomposition, pattern recognition, abstraction, and algorithm design, the full set of DLCS computational practices, through programming, robotics, and data projects.

This course provides one of the most efficient and engaging ways to meet the Massachusetts DLCS expectations for grades 4–6 in a cohesive, developmentally appropriate manner.

## **Academic Benefits**

- Strengthens math reasoning through sequencing, variables, pattern recognition, and data work.
- Supports science learning through modeling, data collection, and simulation.
- Enhances literacy through storytelling, technical writing, and digital communication.
- Builds creativity and design skills transferable to art and multimedia projects.

## **Social and Civic Benefits**

- Reinforces responsible digital citizenship aligned with state expectations.
- Prepares students to navigate online spaces safely and thoughtfully.
- Elevates student voice and collaboration through team-based digital projects.

## **Future-Ready Skill Development**

- Encourages curiosity and confidence with technology.
- Builds foundational skills for middle school STEM pathways, robotics teams, and advanced CS coursework.
- Helps close equity gaps by giving *all* students early exposure to computing.

The Computer Literacy course for Grades 4-6 will become a core part of the school's academic program. It fully aligns with the Massachusetts DLCS Standards, strengthens interdisciplinary learning, and equips students with the essential digital fluency and computational reasoning they need for school, future careers, and life in an increasingly digital world.





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## Chapter 74 Programming

### *Current*

The Chelmsford Public Schools does not offer comprehensive Chapter 74 or non-chapter 74 programming as contained in M.G.L Ch. 74.

## TRANSPORTATION POLICIES

### *Current*

#### **General Education Transportation**

In a typical year, CPS transports approximately 3,600 students using 29 buses daily. We employ a transportation coordinator and have a contract with a transportation services vendor who provides the buses and bus drivers. Most of the buses make three (3) runs each morning and afternoon, with the high school students on the first run, the middle school students on the second run, and the elementary students on the third run. There are also nine (9) late day runs three (3) days a week from mid-October to late May for students who elect to participate in after school activities. Service time begins at 6:30 a.m. and typically ends by 5 p.m.

Students who are in grades K-6 and reside over two miles from school do not pay a fee to ride the bus. All other students pay an annual fee, ranging from \$ 175 (early bird registration discount), \$ 200 (regular registration), or \$ 225 (late registration). There is also a family cap of \$ 400 or up to \$ 500 (late registration). Students who qualify for free and reduced lunch income guidelines do not pay a fee to ride the bus. These fees help to offset approximately 15% of the transportation cost paid to the contracted transportation vendor.

The Parker Middle School currently has 721 grade 5 and 6 students who ride the school bus. They are on the second-tier bus run each day, and ride with 693 grade 7 and 8 students who attend McCarthy Middle School for a total of 1,414 middle school riders. In the morning, the 29 buses run 29 different routes throughout Chelmsford and pick up the 1,414 students at various bus stops. The first morning drop off is the grade 7 and 8 students who attend McCarthy Middle School and then the buses drive over to Parker Middle School (approximately a 4-minute ride) and drop off the grade 5 and 6 students. The average bus capacity at the middle school level is 49 riders with a travel time of 10 to 40 minutes depending on student bus stop. At afternoon dismissal, the McCarthy students are picked up first and once all of the riders are on their correct bus, the 29 buses travel over to the Parker Middle School and those students board their bus. Once all of the students are on their correct bus, the 29 buses travel their respective routes throughout Chelmsford to bring the students to a bus stop near their home. The buses then go to the four elementary schools to make the third run of the day to bring the elementary students home. At the four elementary schools, there are a total of 321 grade 4 students who currently ride



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the school bus. The grade 4 student ridership is mentioned as it impacts one of the proposed options below.

### **Special Education Transportation**

Special education transportation utilizes small vans and minibuses, provided by a contracted transportation services vendor, to transport students between home and school. There are a total of 13 vehicles transporting students in-district, making the high school run first, followed by the middle school and pre-school (CHIPS) run, and ending with the elementary school run. Seven vehicles are currently required to transport the middle school students on the second tier run each school day.

There are twenty-three (23) grade 5 and 6 students and ten (10) grade 7 and 8 students riding the vans and minibuses daily. The average vehicle has 4 to 5 assigned students with a travel time of 10 to 40 minutes depending on the distance between home and school. Once the middle school run is complete, the vehicles begin the four elementary school runs. There are ten (10) grade 4 students who ride the special education vehicles.

### ***Proposed***

#### **General Education Transportation**

In this scenario where Parker Middle School is renovated or a new building is constructed for grades 5-6 as is the current school configuration, no changes would be proposed.

In the scenario where the Parker Middle School is renovated or constructed for grades 4-6, there would be minor changes needed since 321 additional riders (grade 4) would be on the second tier bus run. There would be enough bus capacity on the 29 buses, adding approximately 10 students per bus, bringing the average capacity to 59 riders with a travel time of 10 to 40 minutes for students depending on their bus stop. The capacity of the bus is 83 riders, therefore with 59 riders some students may need to sit three to a bench seat. The bus registration of grade 4 students may increase since they will be farther away from their neighborhood school and it may also be at no cost to the family since they may be over 2 miles. Consideration would also need to be given to the parent pick-up and drop-off area with the increase of families attending the school.

In the scenario where the Parker Middle School is renovated or constructed for grades 5-8, we would still use 29 buses and the middle school would still be the daily second tier run. There is sufficient capacity on the buses for the riders as these students currently ride the bus together in our existing middle school configuration, with a stop at the McCarthy Middle School and then onto the Parker Middle School.



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## Special Education Transportation

In this scenario where Parker Middle School is renovated or a new building is constructed for grades 5-6 as is the current school configuration, no changes would be proposed.

In the scenario where the Parker Middle School is renovated or constructed for grades 4-6, there would be minor changes needed since ten (10) additional riders (grade 4) would be on the second-tier bus run. There may be enough bus capacity on the 7 vehicles, however the travel time of 10 to 40 minutes for the students would be the focus. If the travel time is too long, an additional vehicle may be needed for the second tier run.

In the scenario where the Parker Middle School is renovated or constructed for grades 5-8, we would still use 7 vehicles, and the middle school would still be the second tier run. There is sufficient capacity on the vehicles as these students ride the bus together in our current middle school configuration, with a stop at the McCarthy Middle School and then onto the Parker Middle School.

## FUNCTIONAL & SPATIAL RELATIONSHIPS

Functional and spatial relationships, adjacencies, and the relationship of interior and exterior program elements all impact the overall educational experience. During predesign, successfully articulating these relationships ensures the efficiency and effectiveness of spaces and fully vets the overall impact and/or support one space provides another in terms of how it benefits curriculum, instruction, the student/staff experience, safety, security, and community use. Overall, the District desires to organize the building into two major zones. One zone is the “public” zone, which accommodates spaces that may be accessed by students, staff, and/or the community before, during, and after school hours. These spaces include the cafeteria, gymnasium, music/performance rooms, and administrative offices. The second "private" zone includes all the remaining spaces.

Within the public zone, any design alternative should express the following:

- Administrative suite immediately adjacent to the main entry of the facility with direct visual access to the building approach and the main entry.
- Medical Suite in proximity to the main office administrative suite with direct exterior access for ill students to exit the school without having to exit through the main entry.
- Cafeteria/stage near the music/performance rooms, such that the equipment from the music rooms can be easily moved into the cafeteria for performances.
- Acoustically separate but visually connected dining experiences in the cafeteria.
- Lobby space located to serve the main entry, main office, cafeteria, and gymnasium.
- Kitchen located immediately adjacent to the cafeteria and in close proximity to site service entry.



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- Programmed custodial/maintenance spaces located near the kitchen and service entry.
- Possess the ability to be secured from the remainder of the building during off school hours, special events, or lockdown.

Within the private zone, any design alternatives should express the following:

- Academic areas organized into appropriately sized grade-level neighborhoods, each with:
  - Extended learning spaces
  - Intervention Small Group Rooms
  - Special education-related rooms as required by District Program
  - Library/Media area
- When possible, general education classrooms paired with small group/break out spaces shared between them.
- Special education classrooms are distributed throughout all grade level teams to maximize inclusive practices, allow for effective delivery of related services, and employ Universal Design for Learning principles.
- Possess the ability to be secured from the remainder of the building during off school hours, special events, or lockdown.
- Spatial relationships to support flexibility, student choice, and interdisciplinary learning:
  - music room in proximity to stage/cafeteria;
  - media center in proximity to art and STEAM
  - extended learning in proximity to general classrooms and media center
- Media Center as a destination but with strong connections to small learning communities to allow for a more embedded and centralized feel; some distribution into extended learning space to support an at-hands reach approach to exploration and discovery.

Design alternatives should express the following:

- All playgrounds in proximity to grade level classrooms and the cafeteria. This close geographic relationship will help to easily manage the transition from classroom to recess, from recess to the cafeteria, and from the cafeteria back to the classroom. Additionally, this relationship will support the capability of outdoor learning opportunities.
- A hardscape play area adjacent to the playgrounds.
- Emergency vehicle access to be coordinated with public safety requirements.
- A paved service yard capable of supporting deliveries in a wide variety of vehicles.
- Appropriate number of faculty and staff parking near the academic areas of the building and capable of doubling as event parking near public areas of the building (gymnasium and cafeteria).

Dedicated site circulation for each of the following:

- Parent vehicles
- Buses/Vans
- Pedestrians



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Playfields with reasonable access from the gymnasium and near parking to support community use:

- Youth sports use

The selected enrollment option should include the installation of age-appropriate fully accessible playgrounds located near the cafeteria to best facilitate the daily recess/lunch sequence.

It is important to note that the enrollment option chosen will have a significant impact on the parking and site circulation. The separation of parent vehicles, buses, and pedestrians, and the ability to provide parking and delivery access are key goals in the development of the proposed options.

### **SECURITY & VISUAL ACCESS REQUIREMENTS**

#### **Collaboration, Coordination, and Review of Emergency Response Plans**

Emergency response planning for Chelmsford Public Schools is conducted through a structured, town-wide collaborative process. The District partners with the Chelmsford Police Department, Chelmsford Fire Department, Chelmsford Department of Public Works, and Chelmsford Town Administration to routinely review and update all emergency procedures. This multi-agency partnership ensures a shared understanding of emergency protocols, consistent communication practices, and alignment with community-wide response expectations.

The same coordinated approach will guide planning for the proposed new school. Involving all relevant municipal departments throughout the design and development phases allows first responders to evaluate building features, validate proposed operational procedures, and confirm that the facility supports rapid, efficient, and safe emergency actions. This process reflects core Crime Prevention Through Environmental Design (CPTED) principles by fostering predictable access routes, enhancing natural surveillance opportunities, and reinforcing clearly defined secure zones.

#### **Proposed Physical and Operational Security Requirements**

Chelmsford Public Schools recently completed a comprehensive, districtwide security audit with the Edward Davis Group. The audit evaluated physical security measures, operational practices, and emergency readiness across all school buildings. Recommendations emphasized strengthening primary entry controls, enhancing visibility throughout facilities, and ensuring consistent visitor verification procedures. These recommendations, supported by CPTED best practices, inform the security strategy for the proposed school facility.

#### **Main Entrance and Visitor Management**

The main entrance will be designed as a multi-layered, controlled-access point that incorporates both physical and operational safeguards:



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- **Secured visitor vestibule** that maintains all visitors in a holding area until verification is completed, reinforcing the separation between public and secured school space.
- **Audio/video intercom system** enabling office staff to confirm the purpose of the visit and perform an initial visual screening consistent with natural surveillance practices.
- **Ballistic-resistant glazing** at the main office interface to enhance staff safety during the verification process.
- **Visitor management system** requiring a government-issued ID, automated background check, photograph capture, and issuance of a time-limited badge. Pre-screened visitors may present a QR code for expedited processing.

Visitors are granted entry to the interior of the building only after both the automated screening and office staff's visual assessment are satisfied, supporting CPTED principles of natural access control and territorial reinforcement.

### Surveillance, Visibility, and Lines of Sight

The selected design option will integrate seamlessly with the district's existing Axis Camera Station Pro surveillance platform. Design considerations include:

- 24/7 high-definition recording at key interior and exterior locations.
- Camera placement based on security integrator best practices, ensuring clear sightlines in corridors, entry points, major circulation areas, and exterior gathering spaces.
- Main office monitoring displays, providing continuous awareness of entry points and perimeter activity

These features enhance natural surveillance, improve situational awareness, and support effective response coordination during emergencies.

### Emergency Notification System (ENS)

All Chelmsford schools utilize a standardized Emergency Notification System capable of issuing multiple types of alerts, including active threat, hold-in-place, and evacuation notifications. When activated, visual strobes and audible messages are triggered throughout the building, while a simultaneous signal and camera feed is transmitted directly to Chelmsford Police dispatch.

The District is currently deploying an upgraded digital ENS platform that integrates alerting capabilities directly into classroom and common-area devices. This modern system will be fully incorporated into the proposed school design, supporting CPTED's maintenance principle by ensuring consistent operation and regular testing of life-safety infrastructure.

### Controlled Access for Staff

Staff access is regulated through an electronic badge-based system that aligns with CPTED's natural access control principle. Features include:





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- Role-based access permissions aligned with job duties and building assignments.
- Real-time modification of permissions and the ability to deactivate badges immediately when required.
- Badge design incorporates photographs and color-coded role indicators while omitting staff names to reduce social engineering risk.

This system enables secure, accountable access while maintaining operational flexibility.

### CPTED Compliance Summary

The proposed security, access control, and emergency response framework for the selected school design has been intentionally developed to align with established Crime Prevention Through Environmental Design (CPTED) principles. Natural surveillance is achieved through strategic visibility and comprehensive camera coverage; natural access control is supported through a secured main entrance, defined access pathways, and role-based staff access; territorial reinforcement is established through clearly delineated public and secured areas; and ongoing maintenance is ensured through modern alerting systems, integrated communication platforms, and regular testing of safety infrastructure. Collectively, these measures create a cohesive, proactive safety environment that supports effective emergency response, promotes positive school climate, and enhances the overall security of students, staff, and visitors.

### TYPICAL DAY & WEEK IN THE LIFE OF A STUDENT

When you picture the ideal middle school learning environment, what one word comes to mind?



Members of Chelmsford Public Schools participated in a series of Educational Visioning workshops to inform the future of Parker Middle School. Facilitated by Educational Planner Mike Pirollo and Educational Consultant Paul White of MLP Integrated Design, Inc., in partnership with Ai3 Architects, the process brought together educators, administrators, and community members to reflect on what students need to thrive and how the school's environment can best support teaching,



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learning, and belonging. Through interactive activities and discussions, participants explored four key areas:

- Educational, architectural, and community priorities
- Developmental needs of Grade 4–8 learners
- A vision for high-quality teaching and learning
- The types of learning environments that can support this vision

On October 21, 2025, members of Chelmsford Public Schools participated in the third visioning workshop for the Parker Middle School Building Project, facilitated by Educational Planner Mike Pirolo and Educational Consultant Paul White from MLP Integrated Design, Inc., with Ai3 Architects. Building on the developmental insights and instructional vision established in earlier sessions, this workshop focused on exploring how physical learning environments can support the teaching, learning, and student experiences of the Parker community values.

The goals of the session were to:

- Connect space types and design features to Parker’s desired learning experiences
- Identify themes and patterns within inspirational school environments
- Draft guiding design principles to inform the building project moving forward

Parker Middle School’s envisioned daily and weekly experience is built around predictable structures, movement, interdisciplinary learning, and flexible groupings, specific needs identified for middle school learners. Students begin each day with routines that support belonging and readiness to learn, then move through a balanced schedule of core academics, hands-on learning, wellness opportunities, and structured intervention/enrichment blocks.

A typical week includes:

### **Core Academic Classes (English Language Arts, Mathematics, Science, and Social Studies)**

Students engage in authentic, active learning that is collaborative, hands-on, and connected to real-world contexts. Learning includes whole-group instruction, small-group rotations, independent tasks, and interdisciplinary projects supported by flexible scheduling and team-based teaching structures.

### **WIN / Flex Block**

WIN (What I Need) periods throughout the day for:

- Targeted intervention
- Enrichment and extension activities
- Cross-grade mentoring opportunities
- SEL or advisory experiences



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## **Specials and Hands-On Learning**

Students rotate through Art, STEM, Library/Media, Performing Arts, Technology-rich project spaces, and other enrichments recommended during visioning. These experiences are embedded weekly to ensure consistent access and interdisciplinary integration.

## **Movement and Wellness**

Daily opportunities for movement, embedded in classroom furniture, extended learning spaces, and outdoor learning areas, address developmental needs identified in the visioning process.

Classroom-based learning is defined as:

## **Authentic, Active, Student-Centered Learning**

Learning is “authentic, active, and connected to the real world,” and inclusive, collaborative, and choice driven. Classroom activities include:

- Hands-on projects and inquiry-based tasks that allow students to apply knowledge
- Student discourse, debate, problem-solving, and project-based collaboration
- Reflection and goal-setting routines that support student agency

## **Flexible Groupings & Differentiation**

Classrooms support whole-class, small-group, and individual work through:

- Choice-based stations
- Teacher-guided small groups
- Partner collaborations
- Intervention groupings

These structures align with Universal Design for Learning and student needs for movement, agency, and small-group instruction.

## **Flexible Furniture and Space Design**

Preferred classrooms include flexible seating, writable surfaces, varied work areas, sliding walls, and easily reconfigurable layouts that allow teaching to shift from whole class to breakout quickly.

These design features directly support:

- Project-based learning
- Interdisciplinary units
- Team teaching
- Independent and quiet work



# Parker Middle School Educational Program

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## **Integrated Support Services**

Special education teachers work closely with general educators in shared spaces and co-taught blocks, ensuring inclusive access to core learning.

## **Desired Spatial Relationships / Adjacencies**

The following adjacencies should be prioritized:

### **General Classrooms should be near:**

- Shared small-group rooms
- Extended learning spaces
- Team teacher planning areas
- Grade-level counselor/SPED support staff (distributed across the building)

### **STEM/Art/Makerspaces should be:**

- Centrally located
- Easily accessible from all neighborhoods
- Connected to library/media spaces to form an “innovation hub”

### **Outdoor spaces should be accessible from:**

- Collaboration spaces
- Cafeteria and commons
- STEM and project labs
- Advisory/choice-time areas

These outdoor connections support movement, regulation, and learning flexibility.

### **Calming and sensory spaces should be:**

- Integrated within each grade-level cluster
- Quiet but visible and accessible
- Adjacent to student supports (counseling, behavior specialists)

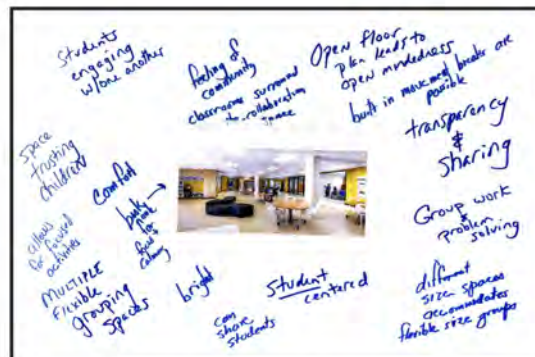
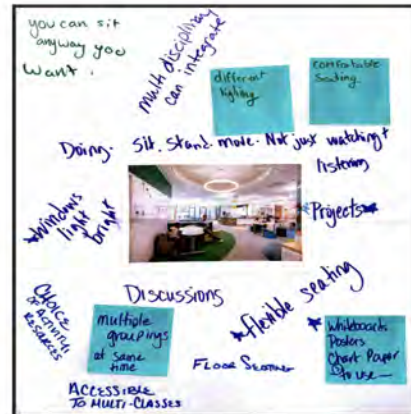
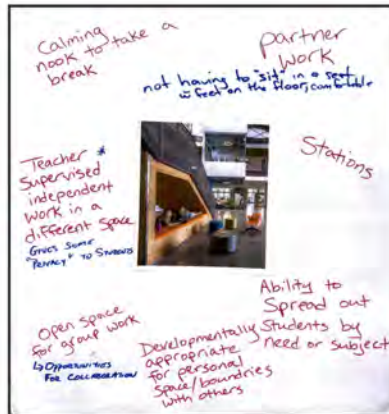


# Parker Middle School Educational Program

## Visualizing The Future

### Visualizing The Future

During visioning sessions, participants moved from inspiration to application.



## Visualizing the Future



# CHELMSFORD PUBLIC SCHOOLS

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Dr. Linda Hirsch, Assistant Superintendent

## MEMORANDUM

To: Dr. Jay Lang, Superintendent  
Members of the Chelmsford School Committee

From: Dr. Linda Hirsch, Assistant Superintendent *Linda J. Hirsch*

Date: January 6, 2026

RE: 2025/26 Student and Family Handbook Section Revisions

---

I am writing to request that the School Committee revisit and approve targeted revisions to the 2025 - 2026 Student and Family Handbook following our initial meeting with the Massachusetts Department of Elementary and Secondary Education (DESE) as part of the Integrated Monitoring Review (IMR) - Group B process.

The Integrated Monitoring Review is DESE's cyclical compliance review designed to ensure that districts meet state and federal requirements related to student rights, equity, and access to educational programs. Group B specifically focuses on policies, procedures, and documentation that demonstrate compliance in areas such as due process, student discipline, civil rights protections, and support for students with disabilities and protected class status.

As a result of feedback received during our initial IMR Group B meeting, DESE representatives identified areas where clarifying language and alignment with current regulatory expectations are needed within the Student and Family Handbook. The required revisions address the following sections of the handbook:

- **Due Process** - page 22
- **PRIDE and Bullying Prevention and Intervention** - page 35
- **Section 504 of the Rehabilitation Act of 1973** - page 42
- **Transgender and Gender Non-Conforming Students** - page 43

Our school attorney reviewed each identified section and provided the necessary language changes. All revisions have been incorporated into the 2025–2026 Student and Family Handbook using track changes to ensure transparency and ease of review. Committee members may locate these edits directly on the pages noted above within the larger handbook document.

Approval of these revisions is necessary to ensure continued compliance with DESE requirements and to demonstrate good-faith responsiveness as part of the IMR process. Once approved, the updated handbook will serve as the district's official guidance document for students, families, and staff for the remainder of the 2025 -2026 school year.

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### Proposed Motion

*I make a motion to approve the revised 2025 - 2026 Student Handbook as presented, inclusive of recommended language revisions resulting from the DESE Integrated Monitoring Review – Group B process, effective immediately.*





**Chelmsford Public Schools  
Student – Family Handbook**

*2025 -2026*

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*This handbook has been translated into the major languages spoken by parents or guardians of District students. If a parent's or student's primary language is not English, and the District has not already translated a student handbook or student code of conduct into their primary language, the District will translate a handbook and/or code of conduct into that language or will make oral interpretation available for any parent or guardian with limited English skills, including parents or guardians who speak low-incidence languages.*

### Communication

If there is a situation at home that might affect your child, please let the teacher, school counselor or administrator know. Adjustments and extra consideration can be given to your child if we understand what he/she is experiencing. Some common situations are the death or serious illness of a family member, the death of a pet, parent business travel, etc. We want to support your child, so please keep us informed. If parents are concerned with any school-related issues, they should first discuss the matter with the teacher involved.

X2 Family Portal is the student information system used by the Chelmsford Public School System. Families will have a unique login to access their children's information (i.e. attendance, grades, schedule, contact information, etc.). It is the parent's responsibility to maintain accurate contact information at all times.

Blackboard ConnectEd is our Community Outreach and Emergency Communication system. It allows us to contact you immediately, effectively, and efficiently by phone or email should we have the need. It is critical that you provide the school office with current contact information in September and to update the information should there be any change during the course of the school year.

### Calendar

#### [School Calendar](#)

The Chelmsford Public School calendar is set each year by the Chelmsford School Committee and is found on the district's website. We encourage you to go to the individual school calendars which can be found on the [district website](#). School events, early release days, field trips, and additional information will be posted on a regular basis.

### Attendance

Massachusetts has a Compulsory Attendance Law. It is the responsibility of a parent or guardian to ensure their child attends school regularly to obtain the maximum benefits from the educational program. It is required that students attend school every day. A student must be at school or at a school-related activity for at least half the school day to be counted as present.

A parent or guardian (Pre-School through Grade 8) is to telephone the school office within 30 minutes from the start of school to report a student's absence and the reason for the absence. Parents/Guardians who do not telephone the school will be contacted regarding the child's whereabouts. See M. G. L. c. 76, § 1A. The school will notify a parent or guardian of the child's absence if the school has not received notification of the absence from the parent or guardian within 3 days of the absence. When a student is absent, they will not be allowed to participate in any athletic or other extra-curricular activity on that day.

Every child between the ages of six (6) and sixteen (16) is required to attend a public school in the town where the student resides, or another day school approved by the school committee. See M. G. L. c. 76, § 1; 603 C.M.R. 8.02; and Chapter 741 of the Acts of 1965. The Superintendent, or designee, may excuse necessary absences totaling no more than seven (7) days or fourteen (14) half days in a six (6) month period. The school makes the final determination as to whether or not an absence is deemed excused.

**Types of Absences:**

1. Unexcused absences may include absences such as truancy, class cuts, and/or frivolous excuses for being out of school or class. Typically, unexcused absences might include family trips, trancies from school, class cuts, etc.
2. Excused absences may include absences such as illness or quarantine (documented by doctor's note), serious illness or death in the family, bereavement, religious observance, documented college visits, school-sponsored field trips, out-of-school suspension, court ordered appearances, weather so inclement as to endanger the health of the student, and other exceptional reasons approved by the Principal. The school office must be notified within 24 hours of the absence in order for it to be considered by the administration for an excused absence. When 24-hour notice is not possible given the nature of the illness, emergency, etc., notice must be provided as soon as possible in order for the absence to be considered excused.

Time out of school can be harmful to a child's progress, growth, and success in school. Parents are strongly discouraged from removing students from school while school is in session. If a student accompanies their parents/guardians on a business and/or personal trip (including vacations), the student, upon return, is responsible for contacting their teacher to discuss missed work and make-up procedures. The teacher is not obligated to provide assignments while the student is not in school. Families must adhere to the provisions of [School Committee Policy](#) and this handbook in regard to all absences.

When a student accumulates 5 school days of unexcused absences or has missed 2 or more classes over five school days due to tardiness, the parents will be contacted and invited to a meeting to develop action steps to address the student's attendance. The action steps shall be developed jointly and agreed upon by the Principal, or a designee, the student and the student's parent or guardian and with input from other relevant school personnel and officials from relevant public safety, health and human service, housing and nonprofit agencies. M. G. L. c. 76, § 1B.

A student who willfully fails to attend school for more than eight (8) school days in a quarter, and is not excused from attendance, may be considered habitually truant.

Under M. G. L. c. 119, § 21, a child may be eligible for "Child Requiring Assistance" services through the juvenile court system if the child: repeatedly runs away from the home of a parent or legal guardian; repeatedly fails to obey the lawful and reasonable commands of a parent or legal guardian, thereby interfering with the parent's/guardian's ability to adequately care for and protect the child; is sexually exploited; repeatedly fails to obey lawful and reasonable school regulations; or is "habitually truant." The school can assist parents with pursuing "CRA" services and supports.

A “51A” is a report of suspected child abuse or neglect that is filed with the Department of Children and Families (“DCF”). Under M. G. L. c. 119, § 51A, a report can be filed on behalf of a child under the age of eighteen for educational neglect if a child is not attending school on a regular basis. This report of suspected Child Abuse or Neglect, commonly referred to as a 51A, is filed with the Department of Children and Family Services (DCF). By law, school personnel are mandated reporters.

#### **Excessive Absenteeism/Truancy**

Parents will be notified if their child has 5 or more unexcused absences in a year, or if the child has missed 2 or more classes due to tardiness for 5 days or more, and will be invited to a meeting to develop action steps to improve the student’s attendance.

#### **Excessive Absenteeism/Truancy**

A student who willfully fails to attend school for more than eight (8) school days in a quarter, and is not excused from attendance, may be considered habitually truant and may be subject to the following non-exclusive list of interventions:

- a. Parent or guardian conference
- b. All future absences must be verified by a physician
- c. Restriction or prohibition on the participation of extracurricular or intramural activities, field trips, or other activities
- d. Filing of a “Failure to Send your Child to School” with the court
- e. Filing of a “Child Requiring Assistance (CRA)” with the court
- f. Filing of a “51A” with the Department of Children and Families (DCF)
- g. The student and parent may be reported to the Chelmsford Public Schools Truancy Officer who may file with Lowell District Court

#### **Excessive Absenteeism/Truancy at the High School Level**

For additional High School attendance procedures, please refer to the Chelmsford High School Addendum document.

#### **Students with Disabilities**

Discussions regarding how the District’s attendance policies and procedures apply to students with disabilities are the responsibility of the Student’s IEP/504 Team.

#### **Disenrollment**

In the event that a student is absent without valid excuse in excess of ten (10) consecutive school days, the student will be subject to disenrollment from the District. Prior to a student’s disenrollment under such circumstances, an

Exit Interview Meeting will be conducted with the student and parents/guardians in accordance with the requirements of Massachusetts law. M. G. L. c. 76, §18.

## College Visits

For High School procedures, please refer to the Chelmsford High School Addendum document.

## Early Dismissal

### Elementary and Middle Schools

Students should be dismissed before the end of the day only in cases of emergency. It is extremely important that students attend school for the entire school day. In cases of requests for early dismissal, it is essential that students present a written note to their elementary teacher and middle school office in the morning indicating the date and time for dismissal. Students will not be allowed to go to anyone's home or with anyone else without a note from their parent or guardian. Parents/Guardians who need to have students dismissed early should come to the office. **All students will be dismissed directly from the office.** No student is allowed to leave the building without checking out from the office first.

### *Registration Procedures*

All students new to Chelmsford Public Schools must register at the Central Administration Building located at 230 North Road, Chelmsford. Please refer to the website for more detailed information.

Children entering kindergarten must be five years of age on or before August 31st of the year in which he/she is to enter kindergarten. Children entering grade one must be six years of age on or before August 31st of the year in which he/she is to enter grade one.

### **To register a child, parents need to present the following before attending school:**

1. Completed Registration Packet
2. Proof of residence – to include:
  - A utility Bill
  - Mortgage Statement or a Signed Lease Agreement
3. Birth certificate
4. Completed immunization record
5. Proof of a current physical

Proof of Parent Identity (examples may include: MA Driver's License, MA ID Card, Out-of-State License, etc.). Students transferring out of school should notify the office and the classroom teacher as soon as possible so



that forms can be promptly processed. Once a withdrawal form has been signed, student records are forwarded by mail to the new school.

For more information regarding special circumstances, please see the following sections: McKinney-Vento, ESSA/Foster Care, Military Students

## Health Services

### CPS Health and Safety Protocols

A nurse is in attendance during academic school hours. The nurse attends to ill or injured students and notifies parents when necessary. It is the responsibility of the parent to inform the nurse of a child's illness/injuries and surgeries. Parents are also responsible for providing medications. It is also the responsibility of the parents to notify the school nurse annually of any condition that affects a child's well-being and safety (e.g., allergic reaction to insect bites, medications, or foods; asthma; diabetes; and/or seizures, etc.).

### Illness

For public health and safety, we request you keep your child home if he/she has a severe cold, rash with other symptoms, and or if they have a steady cough, hacking cough or coughing fits with fever 100 or above. Your child needs to stay home with:

- **Strep Throat-** if you suspect he/she has strep throat. The child should remain home until the child either has had a negative throat culture or has been on antibiotics and fever free for a full 24 hours without the use of fever reducing medication.
- **A fever 100 or above-** may return to school when he/she is fever free for 24 hours without medication (e.g., Tylenol, Advil, Motrin Aleve Ibuprofen or acetaminophen).
- **Vomiting and/or diarrhea-** may return to school 24 hours after his/her last vomiting and/or diarrhea episode.
- **Red or pink itchy eyes with crusty and or green/yellow drainage-** may return to school the day after treated for 24 hours or has no further eye discharge.
- **Head Lice or nits (eggs)-** the nurse will assess the student for the presence of head lice or nits. If head lice or nits are detected, the nurse will contact the parent/guardian and provide education on lice treatment. Based on the discretion of the school nurse, some situations may warrant a dismissal from school.
- **A rash medically undiagnosed-** may require MD clearance at the discretion of the school nurse.
  - **If a student is out for an illness or dismissed due to illness, they may not return for school sponsored activities/sports that day.**

If a child is too ill to remain in school, the nurse will call parent/guardian and or emergency contact numbers for dismissal. The student should not place the call from a school phone or cell phone.

Parents are required to notify the school if your child contracts any contagious diseases (e.g., Chicken Pox, Strep Throat, Whooping Cough, Fifth's Disease, Conjunctivitis, Scabies, Impetigo, Ringworm or Head Lice, etc.). If a child has been absent due to a communicable disease, a physician's release may be required before returning to school.

### **Injuries**

It is the parent's responsibility to notify the school nurse of all injuries (i.e., fracture sprains, stitches, etc.) Guidelines regarding injuries and non-participation in physical education (P.E.) classes and recess as follows:

1. Students with casts, stitches, or splints may not participate in P.E. class, sports or outdoor recess without written consent from the attending physician. All injury notes from the doctor should include the type of injury, any activity limitations or allowance to participate in such activities and the date the child may return to full participation in PE, sports, and recess. Parents' wishes may not supersede this medical prescription. At the school nurses' discretion some P.E. activities may require non-participation for the safety of the student or others.
2. Students need a subsequent doctor's note when it is safe to resume normal activity in P.E. and/or recess.
3. Students using non prescribed/ over the counter support items and ACE wraps may be restricted from certain activities at the school nurse's discretion.
4. If a student is to come to school with a cane, crutches, wheelchair or an assistive device, a doctor's note is required before returning to school. If applicable, such doctor's notes need to indicate if the student can or cannot use stairs. An example of this would be a student with the need to wear a brace that would immobilize a knee.

### **Medications**

It is the policy of Chelmsford Public Schools to administer medications during the school day only when necessary.

#### **Medications in School**

Before the school nurse can administer any medication (prescription or non-prescription) complete signed doctor's orders and parental consent must be received by the health office. Medication orders must be submitted every new school year or at the start or restart of any medication treatment. Medication consent forms are located on the school website under the Health Services tab.

The school nurse supervises the administration of medication at all Chelmsford Public Schools. If medication needs to be administered during school hours, whether it is a prescription or over-the-counter medicine, such administration of medication must be done by the school nurse or with the authorization of the school nurse in accordance with 105 CMR 210.000. Unless the conditions for self-administration outlined in 105 CMR 210 have been met, no student is permitted to carry and/or self-administer medication.

Whenever possible, medication administration should be scheduled at times other than during the school day. If it is necessary that your child receive medicine during the school day, the school nurse is responsible for the administration of all medications. All medications must be delivered to the nurse by a parent, guardian, or another designated adult. Medication must be in its original pharmacy-labeled container and be accompanied by a doctor's order and written parental approval prior to administration. No more than a thirty (30) school day supply shall be stored at the school. Parents/guardians may retrieve the medication from the school at any time. All unused, discontinued, or outdated medications will be returned to the parent/guardian. In extenuating circumstances, with parental consent, when possible, medications may be destroyed by the school nurse in accordance with the policies of the Massachusetts Department of Public Health, Division of Food and Drugs. For short-term prescription medications, i.e., those requiring administration for ten school days or fewer, the pharmacy-labeled container may be used in lieu of a licensed prescriber's order. The written request of a parent/guardian is required.

The school nurse will ensure that there is a proper medication order renewed as necessary including at the beginning of each academic year. Before the student enters school, the medication order shall be obtained by the school nurse, along with any other additional information from the doctor, and the medication administration plan shall be developed in accordance with 105 CMR 210.005.

A medication administration record for each student will be maintained, including a daily log, the medication administration plan, the medication order, and parent/guardian authorization. Prescription medications to be administered "as needed" may be administered by the school nurse or authorized school personnel after the school nurse assesses or consults with the student after each dose.

In the case of field trips and other short-term special school events, every effort will be made to have a nurse or other school staff member trained in prescription medication administration accompany the student. When this is not possible, the school nurse may delegate prescription medication administration to another responsible adult, subject to written consent from the parent/guardian for the named responsible adult, and subject to the requirements of 105 CMR 210. The administration of parenteral medications may not be delegated, with the exception of epinephrine administered in accordance with 105 CMR 210.100. Epinephrine must be administered solely in accordance with 105 CMR 210.100, even if on a field trip. The school nurse cannot delegate the administration of epinephrine to another "responsible adult." Only those allowed under 105 CMR 210.100 can administer epinephrine.

The school nurse may, in accordance with standard nursing practice, refuse to administer or allow to be administered any prescription medication which, based on their individual assessment and professional judgment, has the potential to be harmful, dangerous or inappropriate. Parents/guardians and the doctor will be notified immediately by the school nurse in this scenario.

Students found in possession of unauthorized medications on school grounds or at school-sponsored events may be subject to discipline.

Health Services. Short-term antibiotics are the only prescription medications that do not require a separate signed physician medication order. The instructions on the bottle will be sufficient if the current label is intact, and a parent or guardian signed consent is provided for the short-term antibiotics.

Please Note:

- *Students who have had surgery, dental procedures, or injuries and are taking any type of narcotic pain reliever (i.e., Percocet, Vicodin, Tylenol#3,) are not allowed to return to school until their pain can be managed with a non-narcotic analgesic such as Ibuprofen or Tylenol. Narcotic pain relievers will not be administered in school.*
- *Over the counter medications such as Tylenol and Ibuprofen will not be administered within 30 minutes of the end of the school day as the effects of the medication cannot be evaluated.*

**Medication Delivery/Pick-up Requirements**

**All medications must be delivered to the school and picked up from the school by a responsible adult.**

All medications can be picked up from the nurse's office anytime during the school day. All medications will be disposed of if they are not picked up within one week following termination of the order or if they are not picked up by the last day of school.

**All prescription medications must be in a pharmacy labeled container that includes the child's name, name and correct dose of the medication, physician's name, and current date.** Please ask your pharmacy to provide separate bottles for school and home. Not more than a thirty-day supply of medicine should be delivered to the school. **All nonprescription medications must be in the original manufacturer's container.**

**Additional Medication Information**

- **Students are not permitted to have medicine in the classroom or on their person** without authorization from the parent and school nurse.
- **No medications that are scheduled to be given after the early release dismissal time will be given on school half-days** unless specifically requested in writing by a parent and or guardian.
- **In order for your child to receive any medications on a field trip or for any medications to be sent on a field trip, the medication field trip consent must be completed before your child goes on a field trip.**
- **It is important for the school nurse to be informed of any medication that your child might be taking even if your child does not need to receive these medications during the school day.** It is also important for the school nurse to be informed of any medication changes in a timely manner.

As noted on the emergency form, the school physician has approved, after a nurse's assessment and if deemed appropriate for the safety and welfare of a student, the use of Acetaminophen/Tylenol, Caladryl, Benadryl, Oragel, Vaseline, Sting Relief Wipes, saline eye solutions, Bacitracin, Silvadene cream, Hydrocortisone cream, Ibuprofen/Motrin, Tums and First Aid cream. Students showing signs of a life-threatening allergic reaction or anaphylaxis may be given EpiPen or Narcan and Emergency Medical Services will be summoned.

Guardians must note on their child's annual medical information form if they do not want any of the listed medications or ointments used.

### **Students with Life Threatening Allergies, Asthma, and Seizures**

For the well-being and safety of students with asthma, seizures and allergies, guardians should submit a medical plan of care for that student even if you as guardian do not send in a related medication to the school. Plans of care forms are available on the school's website.

The Chelmsford Public Schools cannot guarantee to provide an allergen-free environment for all students with life-threatening allergies or prevent any harm to students in emergencies. The goal is to minimize the risk of exposure to food allergens that pose a threat to those students, educate the community, and to maintain and regularly update a system-wide protocol for responding to their needs. A system-wide effort requires the cooperation of all groups of people within the system. For more information on protocols for students with life threatening allergies, please go to our [Health Services page on the website](#).

### **Health Examinations, Immunizations, and Exclusions of Students**

#### **Physical Exams and Health Screenings**

Students are required to submit a copy of a physical examination that was completed within one year prior to entrance to Chelmsford Public Schools or within thirty (30) days after entering Chelmsford Public Schools, and at intervals of three years thereafter. In compliance with the Massachusetts Department of Public Health state laws, our district requires physicals for students in kindergarten, third grade, sixth grade, and ninth grade. Students entering Chelmsford Public Schools are required at the time of student registration to provide a copy of a physical examination dated within one year of entrance to school or within 30 days after school entry and at intervals of either three or four years thereafter. A student transferring from another school district shall be examined as an entering Chelmsford Public Schools student.

All students participating in competitive athletics will need to submit a copy of a physical examination every year in which they intend to participate. See 105 CMR 200. Students are also required to submit a copy of a physical examination if they are over the age of fourteen (14) but under the age of sixteen (16) and are requesting employment certificates.

Within thirty (30) days of a student's first day at Chelmsford Public Schools, all students must submit certification that the student has passed a vision screening within the previous twelve (12) months. Vision and hearing screenings will be conducted in the year of school entry and annually through grade five (5), once in grades six (6) through (8), and once in grades nine (9) through twelve (12).

The weight and height of each student will be measured in grades 1, 4, 7, and 10. Every effort will be made to protect the privacy of each student during the screening. School personnel

will not disclose the height, weight or BMI calculations of an individual student to anyone other than the parent/guardian, unless written consent is provided by the parent/guardian. Parents/guardians can request in writing that their child's measurements not be taken.

Postural screening will be conducted annually by the nurse, or other approved personnel approved by the Department of Public Health, on all students grades five (5) through nine (9).

#### **SBIRT: Screening, Brief Intervention, and Referral to Treatment**

Screening, Brief Intervention and Referral to Treatment (SBIRT) will be completed annually in grades [7 and 9]. SBIRT is a verbal screen of students for substance use disorders. Parents and guardian will be notified ahead of time, and either the parent/guardian or the student may opt out of the screening at any time before or during the screening through written notification. Information provided by a student during a screening is confidential, except in instances of an immediate medical emergency or disclosure of the information provided is required by state law. The screening will be implemented in accordance with state and federal laws regarding student confidentiality, including applicable student record laws and regulations.

Definition: SBIRT stands for Screening, Brief Intervention, and Referral to Treatment. An evidence- based screening tool is utilized for the Screening; the Brief Intervention is provided through motivational interviewing and the Referral to Treatment is dependent on resources available in the school and community.

Background: Substance use during adolescence is associated with various negative outcomes including problems in school, injuries, emergency room visits, arrests, violence, and other risky behaviors, such as unprotected sex. The younger a person is when he/she first uses alcohol or drugs, the greater the likelihood that he/she will become dependent and/or addicted as an adult. Additionally, heavy alcohol and marijuana use in adolescence may result in long-lasting functional and structural changes in the brain affecting memory and learning functions, decreasing motivation, and increasing the risk of serious mental illness. In response to the Opioid Crisis, an Opioid Bill was signed by Governor Baker on March 14, 2016, mandating a verbal screening for substance use (also known as Screening, Brief Intervention, Referral to Treatment – SBIRT).

Purpose: The purpose of SBIRT is to promote prevention and identify early risk for substance use in our adolescents and to take appropriate actions as soon as possible if a problem is identified. Neuroscience tells us that the developing adolescent brain is at particular risk for addiction, so intervening early, before a substance use disorder develops, is key to the life-long health of our students. The SBIRT screening process reinforces healthy choices being made by students, identifies those who need intervention and education, ideally before substance use begins, and provides a referral for those who need additional support or treatment. SBIRT screenings are performed like



other health screenings in school settings(i.e., vision, hearing, BMI) with respect to identifying a health condition as soon as possible so as to enable all children to obtain the fullest benefit of their educational opportunities.

**Universal Screening:** The SBIRT protocol developed by the MA Department of Public Health (DPH) for use by school health personnel is a structured, evidence-based conversation that promotes prevention and identifies early risk for substance use among adolescents. It is a UNIVERSAL screening of ALL students in a selected grade level. It is not a targeted screen for selected students, nor is it intended to get anyone “in trouble”. It is neither “drug testing” nor is it a treatment program for students who may be addicted to substances.

**SBIRT Team:** An SBIRT team will be composed of school health personnel, such as school counselors, adjustment counselors, social workers, psychological staff, and health educators. Members of the SBIRT team will implement the screening, provide education to the students and/or provide follow-up as necessary.

### **Vaccination and Immunization**

All students attending, enrolled, or registered to attend Chelmsford Public Schools must present, in accordance with 105 C.M.R. 220, a copy of their certificate of immunization documenting their immunization records before they can attend school unless a waiver of this requirement has been granted based upon documented medical need or sincere religious belief. Students with exemptions may be subject to exclusion during disease outbreaks.

### **Emergency Medical Information Forms**

Emergency Medical Information forms must be completely filled out and returned to the Nurses’ Office each year. Forms provide important phone numbers and contact persons for dismissals, emergencies, and signed permission for some over the counter medications including Tylenol. Forms will be sent home at the beginning of each school year and are available online or at your school nurse’s office.

## *Bus Transportation*

An essential component of a quality education is safe transportation for all students to and from school each day. Each year we experience a variety of parent questions concerning our transportation program. The purpose of this section is to present responses to the most commonly asked questions. This is a resource for parents. Please read the document carefully and reread the document with your child. If questions remain, please feel free to communicate directly with the principal of your child’s school or our transportation supervisor in the superintendent’s office. Your willingness to adhere to these guidelines will be greatly appreciated.

### **BUS QUESTIONS AND ANSWERS**

#### **Q: Does the Chelmsford Public Schools provide transportation for all students?**

**A:** It is the policy of the Chelmsford School Committee to provide bus transportation for all students living beyond a minimum walking distance to school.

#### **Q: Will my child be assigned to a particular bus?**

**A:** Yes. Bus assignments are published on the school website. Individual student bus assignments are available in the X2 Family Portal.

**Q: Will my child be assigned to a particular seat?**

**A:** No, however, the bus driver or school administrator has the authority to direct students to sit in specific seats, particularly when there is a disciplinary concern.

**Q: Will my child be permitted to ride other buses throughout the school year?**

**A:** Students must ride only on their assigned bus. Bus swapping or riding to a friend's house is not permitted. Students are only permitted to change from their assigned bus when the student is employed in a particular location or to visit the Town Library. In both instances, a written request must be given to the building principal three days before the need for such transportation. A response to the request can be expected one day before the request. Requests will be granted only in those instances where there is space available on the desired bus.

**Q: Can I expect transportation to my child's day care facility?**

**A:** Students may only change from their assigned bus to attend a day care facility within the school's attendance area five days a week.

**Q: Can I expect the bus to stop directly in front of my house?**

**A:** No. We try to minimize bus stops in order to promote efficient bus routing. Door to door service should not be expected.

**Q: What responsibilities do parents or guardians have in providing safe transportation for students?**

**A:** Parents or guardians have a number of important responsibilities. They include:

- Parents or guardians of elementary and middle school students should read or review this document with their children.
- Parents or guardians should support the bus regulations and inform their children that they too have the same expectations for behavior and procedures. Parents need to work with the school in setting appropriate expectations.
- Parents or guardians should supervise children waiting for the bus at the bus stop.
- Parents or guardians should instruct their child to be at the bus stop three to five minutes before the expected arrival time of the bus.

**Q: What should a student do if the bus does not arrive at the stop on time?**

**A:** If the bus does not arrive at the stop in a timely manner, e.g., 10-15 minutes past the expected arrival time, the student should return home directly. The parent should call the school to inform the school office of the non-arrival

of the bus and make other arrangements for transportation to school. If a parent or guardian is not present upon the child's return to home, it is recommended that the child go to the home of a predetermined family member. It is recommended that each family speak with their children in the event of this rare occurrence.

**Q: Are parents of kindergarten students expected to meet their child at the bus stop upon returning home from school?**

**A:** Yes. No kindergarten student will be permitted to exit the bus unless there is a responsible adult at the bus stop charged with the responsibility of escorting the child safely home. If no responsible adult is present at the bus stop, the kindergarten child will be returned to the school. The parent will be contacted, and the parent will be responsible for transporting the child home.

**Q: What will happen if the bus is unable to reach a bus stop because of inclement weather or some other unusual circumstance?**

**A:** Bus drivers have been instructed to never let a child out at a stop other than his/her designated stop. All children will return to the school building and parents will be contacted to arrange safe transportation home.

**Q: Will my child receive special training on bus safety?**

**A:** Yes. The school system is required to have training sessions at each school location. There will be a training session at the beginning of the year to review the expectations detailed in this document; introduce all students to bus drivers, thereby reinforcing the importance of following their directions at all times always following his/her directions; and answer any student's questions or respond to student concerns. Training sessions will focus on procedures for exiting a bus during an emergency situation. Training sessions will reinforce the importance of rules and procedures.

**Q: As a parent, what should I do if I have a question or concern about the transportation of my child?**

**A:** Simple problems or student conflicts on the bus can be resolved by contacting the building principal. For other transportation issues, you may want to file a "Bus Issue Identification Form" online. Problems that may require the use of the Bus Issue Identification Form include: a request to change a bus route, a request to change the location of a bus stop, or a concern with a bus driver's adherence to bus regulations. The Bus Issue Identification Form can be found on the school website under Transportation.

**Q: Is it ever appropriate for parents to communicate directly with the management of the transportation company regarding a bus problem?**

**A:** No. The Chelmsford Public Schools transports in excess of 5000 students each day. We have a commitment to safe and efficient transportation. School officials, the Transportation Company and parents need to work together to provide a quality transportation program. Parent support of all messages embedded in this document will be appreciated.

### **Bus Fees**

Chelmsford Public Schools assess a fee for student bus transportation. Transportation fees are assessed as follows:

Kindergarten through grade 6 students will ride free if the distance from the end of their driveway to their school's driveway is beyond 2 miles. All other students in grades K-6 and all students in grades 7-12 will pay the fee to ride the bus. Students qualifying for free or reduced lunch, receive free transportation.

### **Bus Rules**

Parents should be aware that students' opportunity to ride the school bus is conditioned on their behavior and observance of school rules pertaining to proper conduct. Drivers have the daily responsibility of enforcing student rules and regulations for all students and ensuring their safety. Buses are equipped with video monitoring devices. In the event of a problem impacting the safety of students or the failure of students to comply with rules and regulations, the driver will contact the principal for further administrative action.

Please review the following non-exhaustive list of rules so that you can help your child have a positive bus riding experience:

- a. Students are to observe all rules and regulations established by the bus driver.
- b. Each student is to take a seat and remain in that seat until his or her bus stops. It is expected that students will share seats with their peers. Kindergarten students may have assigned seats in the front of the bus. Students in grades 1 through 12 may be assigned seats at the discretion of the bus driver or school administrator.
- c. Students are not permitted to throw anything on the bus or out of the window.
- d. All talking and noise must be kept at a minimum.
- e. No smoking (i.e., including e-cigarettes) is permitted on the bus; this is in accordance with State law.
- f. Students and parents are responsible for any physical damage to the bus.
- g. Inappropriate behavior, including physical contact, is not allowed on or around any bus, or while waiting for the bus.

- h. Riders must keep hands and head inside the bus at all times.
- i. No pets or animals are allowed on the bus, except service animals when required by law.
- j. Students must ride only their assigned bus. At the middle and high school levels, bus swapping for employment purposes, or to go to the library is allowed, provided there is space on the bus. The school bus will not change its routing to accommodate students swapping buses.
- k. Only small musical instruments are permitted on the buses; instruments that can be kept in a child's lap or within the area of a child's seat. Large musical instruments will not be permitted on the bus due to safety concerns. Specific information relative to approved instruments allowed on buses will be given to students and parents when they enroll in the instrumental program.
- l. Students are not allowed to take any photo or video on buses.
- m. All the rules that apply at school apply on the bus.

Students who fail to follow bus rules face the possibility of losing the opportunity of riding any bus to and from school. If a student is referred to the office by a bus driver for breaking a bus rule, this is what may happen depending on the severity of the offense.

#### **School Bus Offenses**

FIRST OFFENSE – At a minimum, a parent or guardian will be contacted.

SECOND OFFENSE AND SUBSEQUENT OFFENSES – A student may be suspended from riding the bus.

- **Please note a serious infraction of the rules may result in an immediate bus suspension at the discretion of the building administrator.**

Additional infractions of the rules may result in permanent suspension from riding the bus. Restitution will not be made for bus fees due to student suspension and/or expulsion.

**Other Transportation Requirements** Drivers shall not pass school buses when passengers are being picked up or discharged. Drivers must come to a full stop when approaching a vehicle that is displaying a "School Bus" sign and flashing front and rear red lights and has stopped to let passengers off. See M. G. L. c. 90, § 14 (punishable by fines and loss of license for repeat violations). With limited exceptions, Massachusetts law prohibits the unnecessary idling of motor vehicles on school grounds. M. G. L. c. 90, § 16B. While on school property, drivers, as well as passengers, must properly fasten safety belts.

#### *Code of Conduct/Consequences*

#### **Student Expectations**

The Chelmsford Public Schools is committed to providing a safe and nurturing environment which embraces a

respect for self and others. Students are responsible to school administrators and teachers for their behavior to and from school, on school grounds, on buses, and during any school-sponsored activity or field trip.

1. Students are expected to report to each class with all their necessary materials, books, writing implements, the day's assignment, and the Reminder Binder (if applicable).
2. Each student should treat the teacher and all members of the class with respect and allow others to participate equally in the lesson.
3. Students will use moderate voices at all times.
4. Students are expected to keep to the right and to avoid blocking other students' movement in the hallways.
5. Running, wrestling, and roughhousing are not allowed at any time.
6. During an emergency drill, students must follow directions, stay with their class, use the proper exits, exit quickly, and refrain from talking.
7. Objects must never be thrown in school.
8. Gum chewing is not allowed in school (elementary & middle school).

Teachers and all school personnel are expected to enforce these behavior expectations at all times. Infractions will be handled using the individual school's discipline procedures.

### **Dress Code**

The Chelmsford Public Schools' dress code supports equitable educational access and will be enforced in a non-discriminatory manner. consistent with the laws that protect students on the basis of race, gender, ethnicity, religion, sexual orientation, household income, gender identity, or cultural observance.

The Chelmsford Public Schools supports students' freedom of expression (including through attire) and does not seek to abridge that expression, provided that such expression does not cause any disruption or disorder within the school. The school district and individual schools are responsible for seeing that student attire does not interfere with the health or safety of any student, and that student attire does not contribute to a hostile or intimidating atmosphere for any student.

#### **1. Basic Principle: Certain body parts must be covered for all students**

Clothes must be worn in a way such that genitals, buttocks, nipples, and chest are fully covered with opaque material. All items listed in the "must wear" and "may wear" categories below must meet this basic principle.

#### **2. Students Must Wear:\***

- Shirt.
- Bottom: pants/sweatpants/shorts/skirt/dress/leggings
- Shoes; activity-specific shoes requirements are permitted (for example for sports)
- Shirts, pants, and dresses must have fabric in the front, back and on the sides.
- Clothing must cover all undergarments.



\* Courses that include attire as part of the curriculum (for example, professionalism, public speaking, and job readiness) may include assignment-specific dress.

\*Nothing in this policy should be read to restrict assignment of class-specific dress (e.g., physical education) or requiring specific clothing for a field trip.

**3. Students May Wear:** (provided they do not violate Section 4 below)

- Protective Hair Styles historically associated with race, including but not limited to, braids, locks, twists, Bantu knots, hair coverings and other formations.

**4. Students Cannot Wear Clothing that Causes Disruption or Disorder or Violates Reasonable Standards of Health, Safety and Cleanliness. Examples may include, but are not limited to:**

- Violent language or images.
- Images or language depicting drugs or alcohol (or any illegal item or activity) or the use of the same.
- Hate speech, profanity, pornography.
- Anything that obscures the face or prevents identification of students in person or on security cameras (except as a religious observance or if the headwear constitutes protective hairstyle as described above)
- Images or language that creates a hostile or intimidating environment based on any protected class.
- Visible underwear. Visible waistbands or straps on undergarments worn under other clothing are not a violation.
- Bathing suits.
- Shoes with wheels in the heel.

Students who violate these dress standards must:

1. Find alternate clothing in their locker or from a friend;
2. Receive alternate clothing from the nurse/office;
3. Ask a parent to bring in alternate clothing or go home to change clothes.

**Items Not Allowed During School**

The following items are not allowed during school hours at school without permission:

1. Electronic games or devices, laser pens or pointers, personal music systems, cameras, video cameras. **(Taking pictures or videos of students and staff is not permitted in school or on buses.)**
2. Squirt guns, water guns, etc.
3. Skateboards/sneakers with built-in wheels. (You may only use the skateboard park after you have gone home or been picked up by your parent/guardian).
4. Lighters, matches or other lighting devices, alcohol, drugs, counterfeit drugs, drug paraphernalia, tobacco

(chewing or smoking, such as cigarettes), vapes, e-cigarettes, tobacco and vape paraphernalia, any weapons including but not limited to firearms,

5. knives (including pocket or utility knives), fireworks, or stink bombs. Bringing any of these items to school will result in suspension or expulsion, and in some cases reported to the police and/or fire department.

6. Other devices that may create a disruption or potentially be a safety risk (i.e. shock delivering devices).

*\* Lockers are school property. There is no expectation of privacy for items contained in school lockers. Items located in your locker are considered to be in your possession and may be confiscated by school administrators.*

#### **Phone Usage**

If students need to contact home, they should see their teacher/administrator to receive permission to use the phone in the classroom or office. Conversely, if a parent needs to speak with a student, the parent should call the school office. All cell phones/communication devices should be off while in school, unless in use for instructional purposes. Any student using a cell phone/communication device for non-instructional purposes while school is in session will have that cell phone confiscated by administration. A first offense will lead to a warning and the administrator will return the phone/communication devices to the student at the end of the day. Second and subsequent offenses may result in the phone being returned only to the parent and/or further disciplinary actions.

#### **Unauthorized Recordings, Photos and Video**

The unauthorized taking or distribution of voice recordings, photographs, or videos of staff or students, at school, on buses, or at a school function, will result in a discipline under MGL c. 71 § 37H ¾ and possible notification to the proper authorities.

#### **Behaviors Not Allowed**

Participation in any of the following result in student discipline. This list is not an exhaustive list but is meant to be illustrative.

1. Throwing objects.
2. Stealing.
3. Threats, acts of intimidation, aggressive behavior (including pushing and shoving), fighting.
4. Borrowing or exchanging money (Items for sale will be confiscated and parents will be notified. Students should not bring large sums of money to school.)
5. Lighters, matches or other lighting devices, alcohol, drugs, counterfeit drugs, drug paraphernalia, tobacco

(chewing or smoking, such as cigarettes), vapes, e-cigarettes, tobacco and vape paraphernalia, any weapons including but not limited to firearms.

6. Damage to, defacing, or tampering with school property or the property of others. (Students may be expected to pay for all damages. Additional consequences may also be enforced, including the option of discipline under MGL c. 71 § 37H ¾).
7. Cheating, plagiarism, unauthorized use of AI, or any other violation of the Academic Honor Code in any form. Cheating is a serious breach of trust and is never acceptable. (See Academic Honor Code)
8. Unauthorized leaving of school grounds. In the event a student leaves the school grounds during the school day, the parent will be notified and will be expected to return the student to school immediately. If a parent cannot be reached, the School Attendance Officer and Police Department will be notified in an effort to locate and return the student to school.
9. Possession, use, or distribution of alcohol, drugs, drug paraphernalia, tobacco/nicotine, or tobacco products or paraphernalia, including e-cigarettes and vaporizers (vaping devices and/or vape pens) on school grounds, within school buildings or facilities, at school-sponsored events, or on a school bus is strictly prohibited and may result in suspension or, where permitted under applicable laws, expulsion from school. Intentionally smelling or inhaling the fumes of any substance having the property of releasing toxic vapors in order to cause intoxication, euphoria, excitement, exhilaration, stupefaction, or dulled senses or nervous system is prohibited. It is also illegal to possess, buy or sell any such substance in order to violate, or aid another to violate, this section. Violations may result in discipline. District and MIAA standards will be applied to athletics and other extracurricular activities. M. G. L. c. 71, § 2A; M. G. L. c. 270, § 18; M. G. L. c. 71, § 37H
10. Harassment, hazing, or bullying.
11. Sexual harassment.
12. Possession or distribution of sexual paraphernalia.
13. Inappropriate use of technology and social media and other violations of the Acceptable Use of Technology Policy (see Technology, Internet, and Email).
14. Insubordination
15. Disrupting the school environment
16. Vandalism

**Forms of Consequences May Include But Are Not Limited To:**

1. Withholding privileges - A student may not be allowed to attend a special program within the school, or school-sponsored events. For example, if a student acted poorly in the cafeteria, the privilege of eating in that setting might be withheld. A student may be required to eat lunch in the school office or in a supervised alternative location. Exclusion from extracurricular activities are not subject to the due process procedures

set forth below or Massachusetts regulations. See 603 CMR 53.11. The Principal may, as a disciplinary measure, remove a student from privileges based on the student's misconduct. Such a removal is not subject to the remainder of this policy, law, or regulation.

2. Detention - A student may be required to serve detention after school. The parent will be notified in advance if a detention is to take place after school hours so that parents can provide transportation from school.
3. Expulsion or Suspension – A student may be disciplined according to M.G.L. c. 71 § 37H, 37H ½ or 37H ¾ depending on the particular circumstances of the infraction.

## ***Due Process***

### **Student Due Process Procedures**

Student disciplinary offenses that may result in suspension or expulsion are subject to certain due process rights and procedures. The following sections provide you with information about these rights.

Suspensions and expulsions of students shall be imposed in compliance with constitutional, statutory, and regulatory requirements, including M. G. L. c. 76, §17; M. G. L. c. 76, §21; M. G. L. c. 71, §37H; M. G. L. c. 71, §37H 1/2; and M. G. L. c. 71, §37H 3/4. The Principal, and/or a designee, where permitted, may exercise their discretion to impose suspensions and expulsions for school rules violations within the limitations and the due process provisions sets forth.

#### **1. DUE-PROCESS RIGHTS FOR STUDENTS CHARGED WITH POSSESSION OF A DANGEROUS WEAPON, POSSESSION OF A CONTROLLED SUBSTANCE, OR ASSAULT OF SCHOOL STAFF AND/OR FOR STUDENTS WHO HAVE BEEN CHARGED WITH OR CONVICTED OF A FELONY (M.G.L. c. 71, § 37H and M.G.L. c. 71, § 37H ½ - also referred to as "statutory offenses.")**

- Interim Short Term Disciplinary Removal: In limited situations where a student is charged with a violation of M.G.L. c. 71, § 37H, or is subject to suspension in accordance with M.G.L. c. 71, § 37H1/2, and is determined by the principal to present an immediate threat to persons, property, or the orderly educational environment of the school, the student may be suspended from school by the principal on an interim short term basis of ten (10) school days or less pending a formal hearing to consider the student's long-term suspension or expulsion. Prior to the imposition of any disciplinary sanction that might result in a student's interim suspension from school for ten (10) consecutive school days or less pending a long-term suspension/expulsion hearing, the student will be given oral notice of the offense with which he/she is charged and an opportunity to respond. In the event that the Principal determines that the student will be suspended from school on an interim, short-term basis pending a formal hearing to consider the student's possible long-term suspension or expulsion, the student and the student's parent(s)/guardian(s) will be notified by telephone and in writing. Such interim, short-term removals shall not

be subject to appeal.

- Disciplinary Sanctions and Appeals: Except where a short term interim removal has been imposed, prior to the imposition of any disciplinary sanction that might result in the student's suspension or expulsion from school for possession of a dangerous weapon, possession of a controlled substance, or assault on school staff and/or due to a felony charge, the student and the parents/guardians will be given written notice in English and in the primary language of the student's home of a principal's hearing at which the student and parent/guardian have the right to be represented by an attorney (at private expense), to examine the evidence against the student, and to present witnesses and documentary evidence in the student's defense. Following this hearing, a written decision will be issued.

Under M. G. L. c. 71, § 37H, a student only has the right to appeal if the student has been expelled although students suspended in excess of ten consecutive days in accordance with M.G.L. c. 71, § 37H will be permitted to appeal their long-term suspension to the Superintendent. The student shall have ten (10) calendar days from the effective date of the exclusion to file a written appeal with the Superintendent. The student and the parent(s)/guardian(s) will have the right to appeal any decision imposing a long-term suspension or expulsion from school to the Superintendent. The student will have the right to counsel at a hearing before the Superintendent and the subject matter of the appeal shall not be limited solely to a factual determination of whether the student has violated any provision of M. G. L. c. 71, § 37H. For exclusions imposed pursuant to M.G.L. c. 71, § 37H ½, the student shall have five (5) calendar days from the effective date of the exclusion to file a written appeal with the superintendent. The superintendent shall hold a hearing with the student and the student's parent or guardian within three (3) calendar days of the student's request for an appeal. At the hearing, the student shall have the right to present oral and written testimony on the student's behalf, and shall have the right to counsel. The Superintendent shall have the authority to overturn or alter the decision of the principal, including recommending an alternate educational program for the student. The Superintendent shall render a decision on the appeal within five (5) calendar days of the hearing. Such decision shall be the final decision of the Chelmsford Public Schools with regard to the student's suspension or expulsion. Pending the outcome of any such appeals, the disciplinary sanction imposed by the principal shall remain in effect. M.G.L. c. 71, § 37H, M.G.L. c. 71, § 37H ½.

NOTE: All proceedings conducted in accordance with M.G.L. c. 71, §§ 37H and 37H ½ shall be conducted by the Principal and may not be delegated to a designee. All appeals of suspensions or expulsions imposed by the Principal in accordance with M.G.L. c. 71, §§ 37H and 37H ½ shall be conducted by the Superintendent and may not be delegated to a designee.

## 2. DUE-PROCESS RIGHTS FOR STUDENTS CHARGED WITH OTHER VIOLATIONS (Non-Statutory Offenses - M.G.L. c. 71, § 37H ¾ and 603 CMR 53.00)

Applicable Definitions:

**Expulsion:** The removal of a student from the school premises, regular classroom activities, and school activities for more than ninety (90) school days, indefinitely, or permanently, as permitted under M.G.L. c. 71, § 37H or

37H½ for:

(a) possession of a dangerous weapon;

(b) possession of a controlled substance;

(c) assault on a member of the educational staff; or

(d) a felony charge or felony delinquency complaint or conviction, or adjudication or admission of guilt with respect to such felony, if a principal determines that the student's continued presence in school would have a substantial detrimental effect on the general welfare of the school, as provided in M.G.L. c. 71, § 37H or 37H½.

**In-School Suspension:** The means removal of a student from regular classroom activities, but not from the school premises, for no more than ten (10) consecutive school days, or no more than ten (10) school days cumulatively for multiple infractions during the school year. Removal solely from participation in extracurricular activities or school-sponsored events, or both, shall not count as removal in calculating school days. In-school suspension for ten (10) school days or less, consecutively or cumulatively during a school year, shall not be considered a short-term suspension. If a student is placed in in-school suspension for more than ten (10) days, consecutively or cumulatively during a school year, such suspension shall be deemed a long-term suspension for due process, appeal, and reporting purposes.

**Long-term Suspension:** The removal of a student from the school premises and regular classroom activities for more than ten (10) consecutive school days, or for more than ten (10) school days cumulatively for multiple disciplinary offenses in any school year. A principal may, in their discretion, allow a student to serve a long-term suspension in school. Removal solely from participation in extracurricular activities or school-sponsored events, or both, shall not count as removal in calculating school days. Except for students who are charged with a disciplinary offense set forth in M.G.L. c. 71, § 37H(a) or (b), or M.G.L. c. 71, § 37H ½, no student may be placed on long-term suspension for one or more disciplinary offenses for more than ninety (90) school days in a school year beginning with the first day that the student is removed from school. No long-term suspension shall extend beyond the end of the school year in which such suspension is imposed.

**Parent:** A student's father, mother, or legal guardian, or person or agency legally authorized to act on behalf of the student in place of or in conjunction with the father, mother, or legal guardian.

**Principal :** The instructional administrative leader of the school or their designee for purposes of school disciplinary matters.

**School-wide Education Service Plan:** The document developed by a school or the District, in accordance with M.G.L. c. 76, §21, which includes a list of education services available to students who are expelled or suspended from school for more than ten (10) consecutive days.

**Short-term Suspension** The removal of a student from the school premises and regular classroom activities for ten consecutive school days or less. A principal may, in their discretion, allow a student to serve a short-term suspension in school. Removal solely from participation in extracurricular activities or school-sponsored events, or both, shall not count as removal in calculating school days.

**Superintendent:** The Superintendent of the Chelmsford Public Schools or their designees for purposes of a

disciplinary appeal hearing conducted in accordance 603 CMR 53.00.

**Suspension** means short-term suspension and long-term suspension unless otherwise stated.

Applicable Due Process Procedures:

#### i.In-School Suspension

The Principal may use in-school suspension as an alternative to short-term suspension for disciplinary offenses. Prior to imposing an in-school suspension, the Principal shall inform the student of the disciplinary offense(s) of which the student is accused and provide the student an opportunity to dispute the charges and explain the circumstances surrounding the alleged incident. If the Principal determines that the student committed the disciplinary offense, the principal shall inform the student of the length of the student's in-school suspension, which shall not exceed ten (10) school days cumulatively or consecutively in the school year.

On the same day as the in-school suspension decision, the Principal shall make reasonable efforts to notify the parent orally as soon as possible of the disciplinary offense, the reasons for concluding that the student committed the infraction, and the length of the in-school suspension. The Principal shall also invite the parent to a meeting to discuss the student's academic performance and behavior, strategies for student engagement, and possible responses to the behavior. Such meeting shall be scheduled on the day of the suspension if possible, and if not, as soon thereafter as possible. If the Principal is unable to reach the parent after making and documenting at least two (2) attempts to do so, such attempts shall constitute reasonable efforts for purposes of orally informing the parent of the in-school suspension. The Principal shall further send written notice to the student and parent about the in-school suspension, including the reason and the length of the in-school suspension, and inviting the parent to a meeting with the principal for the purpose set forth in 603 CMR 53.10 (4), if such meeting has not already occurred. The principal shall deliver such notice on the day on which the suspension is to be served by hand-delivery, certified mail, first-class mail, email to an address provided by the parent for school communications, or other method of delivery agreed to by the principal and the parent.

#### i.Out-of-School Suspension

- Notice and Principal's Hearing (603 CMR 53.08):

Prior to the imposition of a short-term out-of-school suspension or a long-term suspension under this section, the Principal shall provide oral and written notice of the charges and potential disciplinary sanction and of the student's and parent's/guardian's right to participate in a hearing with the Principal, to contest the charges against the student and to provide evidence, including mitigating facts, and witnesses in the student's defense. If the student may be subject to long-term suspension for school rules violations, the Notice shall further inform the parent/guardian and student of the following additional rights:

- In advance of the hearing, the opportunity to review the student's record and the documents upon which the principal may rely in making a determination to suspend the student or not;
- the right to be represented by counsel or a lay person of the student's choice, at the student's/parent's expense;



- the right to produce witnesses on his or her behalf and to present the student's explanation of the alleged incident, but the student may not be compelled to do so; and
- the right to cross-examine witnesses presented by the school; and
- the right to request that the hearing be recorded by the principal, and to receive a copy of the audio recording provided to the student or parent/guardian upon request. If the student or parent/guardian requests an audio recording, the principal shall inform all participants before the hearing that an audio record will be made and a copy will be provided to the student and parent upon request.

The hearing may take place without the student's parent(s)/guardian(s) only if the Principal has sent written notice and has documented at least two (2) attempts to contact the parent/guardian in the manner specified by the parent for emergency notification.

The purpose of the Principal's hearing is to hear and consider information regarding the alleged incident for which the student may be suspended, to provide the student an opportunity to dispute the charges and explain the circumstances surrounding the alleged incident, to determine if the student committed the disciplinary offense, and if so, the consequences for the infraction.

In every case of student misconduct for which suspension may be imposed under this section, the Principal will exercise discretion in deciding the consequence for the offense and, where appropriate, shall avoid using long-term suspension from school as a consequence until alternatives have been tried. Alternatives may include, but are not limited to, the use of evidence-based strategies and programs such as mediation, conflict resolution, restorative justice, and/or positive interventions and supports.

#### • Short-term Suspension Hearing

The Principal shall discuss the disciplinary offense, the basis for the charge, and any other pertinent information. The student and the parents/guardians shall have an opportunity to present information, including mitigating facts, that the Principal or the Principal's designee should consider in determining whether other remedies and consequences may be appropriate. The Principal designee shall provide the parents/guardians, if present, an opportunity to discuss the student's conduct and offer information, including mitigating circumstances, that the Principal should consider in determining consequences for the student. Students and parents do not have the right under applicable policies and regulations to be represented by an attorney at a short-term suspension hearing.

Based on the preponderance of the evidence and available information, including mitigating circumstances, the Principal shall determine whether there is a preponderance of evidence to support a determination that the student committed the disciplinary offense, and, if so, the remedy or consequence to be imposed. In accordance with the requirements of M.G.L. c. 71, § 37H3/4, as amended through Chapter 177 of the Acts of 2022, and 603 CMR 53.05, the Principal shall, when acting as the decision-maker at a disciplinary hearing to consider a student's possible short-term or long-term out-of-school suspension for violations of school rules other than offenses involving drugs, weapons, assaults on school staff, and/or felony offenses, first consider ways to re-engage the student in the learning process. The Principal or designee shall not suspend the student from school

on a short-term or long-term basis under such circumstances until alternative remedies have been employed and their use and results documented unless specific reasons are documented as to why such alternative remedies would be unsuitable or counter-productive, or unless the student's continued presence in school would pose a specific, documentable concern about the infliction of serious bodily injury or other serious harm (physical and/or psychological) upon another person while in school. Alternative remedies for the purposes of these requirements may include but shall not be limited to: (i) mediation; (ii) conflict resolution; (iii) restorative justice; and (iv) collaborative problem solving.

The Principal shall provide written notice to the student and parents/guardians of the Principal's findings and determination and the reasons for it, and, if the student is suspended, the type and duration of the suspension and of the student's opportunity to make up assignments and such other schoolwork as needed to make academic progress during the period of removal. The determination shall be in writing and may be in the form of an update to the original written notice of hearing.

In the event of a short-term or long-term out-of-school suspension of a student in grades K-3, the Principal shall also send a copy of the written determination to the Superintendent and explain the reasons for imposing an out-of-school suspension, before the suspension takes effect.

- Long-term Suspension Hearing

In addition to the rights afforded a student in a short-term suspension hearing, the student and parents/guardians shall also have the opportunity to review the student's record and the documents upon which the school may rely at the disciplinary hearing; the right to be represented by an attorney or a lay person of the student's choice (at the student's/parent's/guardian's expense); the right to produce witnesses on the student's behalf and to present the student's explanation of the alleged incident and any mitigating evidence (although the student may not be compelled to do so); the right to cross-examine witnesses presented by the school; and the right to request that the hearing be recorded and to receive a copy of the audio recording upon request. If the student or parent requests an audio recording, the Principal shall inform all participants before the hearing that an audio recording will be made and a copy will be provided to the student and parent upon request.

Based on the preponderance of evidence presented at the hearing, the Principal shall determine whether the student committed the disciplinary offense, and, if so, after considering mitigating circumstances and alternatives to suspension, the remedy or consequence to be imposed. The Principal shall send the written determination in English and the primary language spoken in the student's home to the student and parent/guardian by certified first-class mail and by email to an address provided by the parent for school communications, or by any other method of delivery agreed to by the principal and the parent/guardian.

If the student is suspended for more than ten (10) school days for a single infraction or for more than ten (10) school days cumulatively for multiple non-statutory offenses in any school year, the notice will include written notification of the right to appeal to the Superintendent.

- Alternative Remedies to Suspensions

The District is committed to maintaining a safe, supportive, and inclusive learning environment while minimizing the loss of instructional time for students. In accordance with Massachusetts law, the District emphasizes the use of alternative remedies to suspension whenever appropriate and feasible, particularly for non-violent, non-criminal, and first-time offenses.

Alternative remedies are intended to address student behavior through instructional, restorative, and supportive approaches that promote accountability, skill-building, and positive school engagement.

Depending on the nature of the behavior and the individual needs of the student, alternatives to suspension may include, but are not limited to:

- Restorative practices, such as restorative conversations, mediation, or restorative circles
- Behavioral interventions or contracts developed collaboratively with the student
- Counseling or support services, including referrals to school counselors, adjustment counselors, or social workers
- Conflict resolution or problem-solving meetings
- Parent/guardian conferences
- In-school supports, such as structured reflection time or supervised intervention periods
- Positive behavioral interventions and supports (PBIS)
- Social-emotional learning instruction
- Academic or behavioral skill-building assignments
- Check-in/check-out systems or mentoring supports

The District is committed to implementing disciplinary practices in an equitable, consistent, and developmentally appropriate manner. Alternative remedies are a key component of this commitment and reflect the District's belief that student behavior is best addressed through education, support, and restorative approaches whenever possible.

- Emergency Removal for Non-Statutory Offenses (603 CMR 53.07)

The Principal may remove a student from school temporarily when a student is charged with a violation of school rules in accordance with M.G.L. c. 71, § 37H3/4, the continued presence of the student poses a danger to persons or property, or materially and substantially disrupts the order of the school, and, in the Principal's judgment, there is no alternative available to alleviate the danger or disruption presented. The emergency removal shall not exceed two (2) school days following the day of the emergency removal. In the event of an emergency removal from school, the principal will not release the student until adequate provisions have been made for the student's safety and transportation.

In the event of an emergency removal, the principal shall make immediate and reasonable efforts to orally notify the student and the student's parent/guardian of the emergency removal and the reason(s) therefor. The Principal or designee shall also provide written notice to the student and parents/guardians and provide the student an opportunity for a disciplinary hearing with the Principal, and the parent/guardian an opportunity to attend the hearing, to be conducted before the expiration of the two (2) school days following the Student's

emergency removal, unless an extension of time for hearing is otherwise agreed to by the Principal, student, and parent/guardian.

The Principal shall render a decision orally on the same day as the disciplinary hearing, and in writing no later than the following school day, which meets the requirements of 603 CMR 53.08.

• Appeals (M.G.L. c. 71, § 37H3/4)

Students do not have the right to appeal an in-school or short-term out-of-school suspension imposed pursuant to M.G.L. c. 71, § 37H3/4. Students and parents/guardians do, however, have the right to appeal a long-term suspension imposed by the Principal to the Superintendent. The student and/or the parent/guardian shall have five (5) calendar days following the effective date of the suspension to submit a written request for an appeal to the Superintendent but may be granted an extension of time of up to seven (7) calendar days upon written request. If the appeal is not timely filed, the superintendent may deny the appeal.

The Superintendent or a Superintendent's designee will hold a hearing with the student and the parent(s)/guardian(s) within three (3) school days of the student's written appeal. The time may be extended by up to seven (7) calendar days if requested by the parent(s)/guardian(s). The Superintendent's appeal hearing may proceed without the parent(s)/guardian(s) only if a good faith effort was made to include parent(s)/guardian(s). The Superintendent shall be presumed to have made a good faith effort if the superintendent has made efforts to find a day and time for the hearing that would allow the parent and superintendent to participate. The Superintendent shall send written notice to the parent/guardian of the date, time, and location of the hearing in both English and in the primary language of the student's home.

At the appeal hearing, the Superintendent shall determine whether the student committed the disciplinary offense of which the student is accused, and if so, the appropriate consequence therefor. The student shall have all of the rights afforded to students at the Principal's hearing for long-term suspension, including the right to be represented by an attorney at private expense. The Superintendent will issue a written decision within five (5) calendar days of the hearing. If the superintendent determines that the student committed the disciplinary offense, the superintendent may impose the same or a lesser consequence than the principal but may not impose a suspension greater than that imposed by the principal's decision.

In considering said the student's appeal and the sanctions for the violation(s) of school rules found to have occurred, the superintendent/designee shall not impose/uphold a suspension from school as a consequence until alternative remedies have been tried, except:

- (1) where the Superintendent or designee documents specific reasons why alternative remedies are unsuitable or counterproductive; or
- (2) where the Superintendent or designee determines that the student's continued presence in school would pose a specific, documented concern about the infliction of serious bodily injury or other serious harm to another person while in school.

The Superintendent's appeal decision shall constitute the final decision of the Chelmsford Public Schools.

*\*For additional information regarding applicable laws and regulations, please see Appendix A.*

#### **Educational Services During Removals and School-Wide Education Service Plan – M.G.L. c. 76, § 21**

Students who are suspended from school for ten (10) or fewer consecutive school days have the opportunity to make academic progress during the period of suspension, to independently complete their regular assignments, and to make up assignments, tests, and quizzes missed due to the suspension, so as to continue to earn credits toward their promotion/graduation.

Students who are expelled or suspended from school in excess of ten (10) consecutive school days shall have the right to access services through the District to ensure their continued academic progress and earning of credits toward the student's promotion or graduation. The Chelmsford Public Schools has developed a school-wide Education Service Plan for all students who are expelled or suspended from school for more than ten (10) consecutive school days. Upon selection of an available alternative educational service by the student and the student's parents/guardians, the school shall facilitate and verify the student's enrollment in the service. In addition to the above educational services provisions applicable to all District students, students who have been found eligible for special education services must be provided with a free appropriate public education as of the 11<sup>th</sup> cumulative day of disciplinary removal in a school year.

In compliance with 603 CMR 53.14, the Chelmsford Public Schools will collect and annually report data to DESE regarding suspensions, expulsions, and emergency removals, access to education services, and other information deemed necessary by DESE in the form and manner determined by DESE. The Principal will periodically review discipline data by selected student populations, including but not limited to race and ethnicity, English language learner status, disability status, gender, and socioeconomic status, and assess the extent of removal, its impact on such selected student populations, and whether to modify disciplinary practices.

#### **DISCIPLINARY PROCEDURES FOR STUDENTS WITH DISABILITIES**

All students are expected to meet the requirements for behavior as set forth in this handbook. In addition to those due process protections afforded to all students, the Individuals with Disabilities Education Act (IDEA), and related regulations, require that additional provisions be made for students who have been found eligible for special education services or who the school district knows or has reason to know might be eligible for such services. Students who have been found to have a disability that impacts upon a major life activity, as defined under §504 of the Rehabilitation Act of 1973, are, generally, also entitled to increased procedural protections upon the imposition of a discipline sanction that will result in the student's removal for more than ten (10) consecutive school days or which will result in a pattern of short term removals exceeding ten (10) school days in a given year. The following additional requirements apply to the discipline of students with disabilities:

1. Students with disabilities may be excluded from their programs for ten (10) school days or less to the extent that such sanctions would be applied to all students. Before a student with a disability can be excluded from his/her program for more than ten (10) consecutive school days in a given school year or subjected to a pattern of removal constituting a "change of placement," building administrators, the

student's parent(s)/guardian(s), and relevant members of the student's IEP or 504 Team will meet to review all relevant information in the student's file, including the IEP, any teacher visits, and any relevant information from the parents, to determine whether the behavior was caused by or had a direct and substantial relationship to the disability or was the direct result of the district's failure to implement the IEP—"a manifestation determination."

2. No later than the date of the decision to take disciplinary action, the school district will notify the parent(s) of that decision and provide them with the written notice of procedural safeguards.

*Team Determination that the Conduct was Not a Manifestation of the Student's Disability*

1. If building administrators, the student's parent(s)/guardian(s), and relevant members of the student's IEP or 504 Team determine that the student's conduct was NOT a manifestation of the student's disability, the school may discipline the student in accordance with the procedures and penalties applicable to all students, except that students eligible for special education are entitled to services to enable the student, although in another setting, to continue to participate in the general education curriculum and to progress toward IEP goals as of the eleventh (11<sup>th</sup>) day of disciplinary exclusion in the school year. Such services are not available to students under Section 504. The student's IEP Team will identify the services necessary to allow the student to continue to participate in the general education curriculum and to progress toward IEP goals during the period of exclusion, review any existing behavior intervention plan or, may, as appropriate, conduct a functional behavioral assessment, to address the behavior so that it does not recur.

*Team Determination that the Conduct Was a Manifestation of the Student's Disability*

1. If building administrators, the student's parent(s)/guardian(s), and relevant members of the student's IEP or 504 Team determine that the misconduct giving rise to disciplinary action was a manifestation of the student's disability, the student will not be subjected to further disciplinary removal or exclusion from the student's current educational program based on that incident of misconduct (except for conduct involving weapons, drugs, or resulting in serious bodily injury to others). The student's IEP Team shall either: if a behavior intervention plan has already been developed, review and modify it, as necessary, to address the behavior; or arrange for a functional behavioral assessment and implement a behavior intervention plan for the child.

*Special Circumstances*

1. If a student with a disability possesses or uses illegal drugs, sells or solicits a controlled substance, possesses a dangerous weapon, or causes serious bodily injury to another on school grounds or at a school function, the District may, with or without parent/guardian consent, and regardless of the manifestation determination, place the student in an interim alternative educational setting (IAES) for up to forty-five (45) school days. A court or BSEA Hearing Officer may also order the placement of a student who presents a substantial likelihood of injury to self or others in an appropriate interim setting for up to forty-five (45) school days. A parent can also consent to a forty-five (45) school day interim setting. If the school district requests a hearing because it believes that maintaining the

student's current placement is substantially likely to result in injury to the student or others, the student remains in the disciplinary placement, if any, until the decision of the hearing officer or the end of the time period for the disciplinary action, whichever comes first, unless the parent and the school district agree otherwise.

2. The interim alternative setting must enable the student to participate in the general curriculum, although in another setting, and progress toward the goals in the IEP. The interim alternative setting must also provide services and modifications designed to address the behavior giving rise to the removal and to prevent the behavior from reoccurring.
3. At the conclusion of the forty-five (45) school day period, the student shall be returned to his/her previous placement unless the parent (or student if 18+) consents to an extension of the interim alternative setting or an Order is obtained from the Bureau of Special Education Appeal authorizing the student's continued removal.
4. The parent shall have the right to appeal the Team's manifestation determination, the imposition of a disciplinary change in placement, and the student's placement in an interim alternative educational setting to the Bureau of Special Education Appeals. The student will remain in the disciplinary placement imposed by school authorities pending a decision on the appeal or until the expiration of the disciplinary sanction, whichever comes first.

Note: If, prior to the disciplinary action, the school district had knowledge that the student may be a student with a disability, then the district will make all protections available to the student (e.g., manifestation determination) until and unless the student is subsequently determined not to be eligible. The district may be considered to have prior knowledge if: (a) the parent had expressed concern in writing; (b) the parent had requested an evaluation; or (c) District staff had expressed directly to the special education director or other supervisory personnel specific concerns about a pattern of behavior demonstrated by the student. The district may not be considered to have had prior knowledge if the parent has not consented to an evaluation of the student or has refused special education services, or if an evaluation of the student has resulted in a determination of ineligibility. If a request is made for an evaluation of a student's eligibility for special education services under the Individuals with Disabilities Education Act (IDEA) during the time period in which the student is subjected to disciplinary measures, the evaluation must be conducted in an expedited manner. Until the evaluation is completed, the student will remain in the educational placement determined by school authorities, which may include suspension or expulsion from school. If the suspension imposed terminates prior to the completion of said expedited evaluation, the student shall be allowed to return to school immediately upon the conclusion of the disciplinary exclusion. If the student is found eligible, then he/she receives all procedural protections subsequent to the finding of eligibility.

#### **Right to Equal Education**

Every person shall have a right to attend the public schools of the town where she/he actually resides, subject to the following section. No school committee is required to enroll a person who does not actually reside in the town



unless said enrollment is authorized by law or by the school committee. Any person who violates or assists in the violation of this provision may be required to remit full restitution to the town of the improperly attended public schools. No person shall be excluded from or discriminated against in admission to a public school of any town, or in obtaining the advantages, privileges and courses of study of such public school on account of race, color, sex, gender identity, religion, national origin or sexual orientation, M.G.L. c. 76, § 5.

### **Notice of Non-Discrimination**

The Chelmsford Public Schools does not tolerate discrimination against students, parents, employees or the general public on the basis of race<sup>1</sup>, color, national origin, sex, sexual orientation, gender identity, pregnancy or pregnancy status, disability, homelessness, religion, age or immigration status. The Chelmsford Public Schools is also committed to maintaining a school environment free of harassment based on race, color, religion, national origin, sex, gender, sexual orientation, gender identity, pregnancy or pregnancy status, age, genetic information, ethnic background, ancestry, disability, or any category protected by state or federal law. In addition, the District provides equal access to all designated youth groups. Consistent with the requirements of the McKinney-Vento Act, the District also does not discriminate against students on the basis of homelessness.

The Superintendent shall designate at least one administrator to serve as the compliance officer for the District's non-discrimination policies in education-related activities, including but not limited to responding to inquiries related to Title VI of the Civil Rights Act of 1964; Title VII of the Civil Rights Act of 1964; Title IX of the Education Amendments of 1972; Section 504 of the Rehabilitation Act of 1973; Title II of the Americans with Disabilities Act; the Age Act; M.G.L. c. 76, § 5; M.G.L. c. 151B and 151C; and 603 C.M.R. § 26.00. Inquiries about the application of Title IX to the District may be referred to the District's Title IX Coordinator, to the Assistant Secretary of the U.S. Department of Education, or both.

The Chelmsford Public Schools' policy of nondiscrimination will extend to students, staff, the general public, and individuals with whom it does business; no person shall be excluded from or discriminated against in employment, admission to a public school of Chelmsford or in obtaining the advantages, privileges, and courses of study of such public school on account of race, color, religion, national origin, sex, gender, sexual orientation, gender identity, pregnancy or pregnancy status, age, genetic information, ethnic background, ancestry, disability, or any category protected by state or federal law.

In addition to designating at least one administrator to respond to inquiries regarding the District's non-discrimination policies, the District has adopted grievance procedures for addressing reports of discrimination, harassment and retaliation under the protected classes identified in this policy. If an individual is interested in filing a complaint that they have been discriminated against because of race, color, national origin, sex, sexual orientation, gender identity, pregnancy or pregnancy status, disability including meal modifications, homelessness, religion, age or immigration status, their complaint should be filed in accordance with the District's grievance procedures for discrimination, harassment, and retaliation.

A complete copy of the District's Civil Rights Grievance Procedures are available [here](#).

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<sup>1</sup> Under Massachusetts law, "'Race', as applied to a prohibition on discrimination based on race, shall include traits historically associated with race, including, but not limited to, hair texture, hair type, hair length and protective hairstyles." M. G. L. c. 4, § 7. Protective hairstyles, "shall include, but not be limited to, braids, locks, twists, Bantu knots, hair coverings and other formations." *Id.*

A complete copy of the District's Title IX Sexual Harassment Grievance Procedures are available [here](#).

Chelmsford Public Schools Civil Rights and Title IX Coordinator:

Diane Carey, Director of Human Resources

[careyd@chelmsford.k12.ma.us](mailto:careyd@chelmsford.k12.ma.us)

978-251-5100 X6904

## **TITLE IX**

Title IX of the Education Amendments of 1972

The District does not tolerate discrimination against students, parents, employees, or the general public on the basis of sex. The District is also committed to maintaining a school environment free of harassment based on sex, including harassment based on gender, sexual orientation, gender identity, pregnancy or parenting status. The District's policy of nondiscrimination extends to students, staff, the general public, and individuals with whom it does business; no person shall be excluded from or discriminated against in employment, admission to the District or in obtaining the advantages, privileges, and courses of study of such public school on account of sex.

How to Report Sexual Harassment: Individuals are encouraged to report allegations of sexual harassment to the District Title IX Coordinator or the Principal. Any report of sexual harassment, as defined under Title IX of the Education Amendments of 1972, will be responded to promptly in accordance with the District's Title IX Sexual Harassment Grievance Procedure.

Reports of discriminatory harassment not constituting sexual harassment as defined under Title IX of the Education Amendments of 1972, will be initially addressed through the District's Title IX Sexual Harassment Grievance Procedure and may, if dismissed under that procedure, be investigated in accordance with the District's Civil Rights Grievance Procedure.

Upon receipt of a report of sexual harassment, the Title IX Coordinator will: (1) promptly and confidentially contact the complainant to discuss the availability of supportive measures; (2) inform the complainant of the availability of supportive measures with or without the filing of a Title IX Formal Complaint; (3) consider the complainant's wishes with respect to supportive measures; (4) if the school district does not provide the complainant with supportive measures, document the reasons why such response was reasonable; and (5) explain to the complainant the process for filing a Title IX Formal Complaint.

Inquiries about the application of Title IX may be directed to the District's Title IX Coordinator and/or the Assistant Secretary of the U.S. Department of Education, Office for Civil Rights.

Any employee or student found to have engaged in sexual harassment may be subject to disciplinary action. Students found to have engaged in sexual harassment may be subject to disciplinary proceedings in accordance with procedures set forth in the disciplinary due process section of this handbook and applicable state and federal laws and regulations. Staff members determined to have engaged in sexual harassment may be subject to professional discipline including but not limited to possible termination of employment.

**Civil Rights Policy for the School Food Service Program**

The Chelmsford Public Schools ("Chelmsford" or "District") is a sponsor of the U.S. Department of Agriculture (USDA) Food and Nutrition Services (FNS) Child Nutrition Programs. In accordance with Federal law and U.S. Department of Agriculture policy, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, age, or disability. To file a complaint of discrimination, write USDA, Director, Office of Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410 or call (800) 7953272 or (202) 720-6382 (TTY). USDA is an equal opportunity provider and employer.

In addition to USDA policy and federal law, Chelmsford provides benefits to all eligible individuals without discrimination in accordance with state civil rights laws. To this end, Chelmsford is committed to maintaining school environments free of discrimination, harassment or retaliation based on race, color, religion, ancestry, national origin, sex, sexual orientation, gender identity, age, homelessness, or disability. Harassment, discrimination, and retaliation in any form or for any reason is prohibited. This includes harassment or discrimination by administrators, personnel, students, vendors and other individuals in school or at school related events.

Chelmsford will make meal modifications and/or substitutions, at no cost to the student or parent/guardian, for students who are unable to eat meals served in any Child Nutrition Programs because of their disability(ies). To request a meal modification and/or substitution based on your child's disability, please contact Chelmsford's 504 Coordinator and submit supporting documentation, including a medical statement signed by a state licensed healthcare professional or registered dietitian. Parents/guardians are encouraged to contact Chelmsford's 504 Coordinator and submit supporting documentation. The medical statement must include the following information: information about the child's disability that is sufficient to allow Chelmsford to understand how it restricts the child's diet; an explanation of what accommodations are necessary; and the food or foods to be omitted and recommended alternatives. A request for meal modification may be declined if such a modification would fundamentally alter the nature of the of Child Nutrition Program.

Chelmsford's 504 Coordinator can be reached at:

Amy Reese, Director of Student Services  
reesea@chelmsford.k12.ma.us  
978-251-5111 X6919

### PRIDE and Bullying Prevention and Intervention

We believe that there are certain personal characteristics that need to be cultivated within children in order for them to reach their potential throughout their formal education and position themselves for a lifetime of success. Chelmsford Public Schools will provide support for students to grow in these areas as they move through our system Pre-K through Grade 12 in a consistent and purposeful manner by unifying our successful academic and nonacademic programming that identifies and promotes prosocial and healthy behaviors. Therefore, we have developed our district-wide program, PRIDE.

This program is modeled after the Massachusetts Department of Elementary and Secondary Education Model Bullying Prevention and Intervention Plan and includes the years of professional development and bullying rubrics and procedures created by the staff of the Chelmsford Public Schools. It is designed to satisfy the requirements of by M.G.L. c. 71, § 370. It has been revised and submitted to the state as the amendments to the law have required.

#### **Deleted: Due Process Under M.G.L. c. 71, § 37H ½**

(For ALL offenses except for possession of a dangerous weapon, possession of a controlled substance, assault on staff and felony offenses)

**Please note: these due process procedures apply to M.G.L. c. 71, § 37H ½ ONLY. For due process procedures for offenses under M.G.L. c. 71, §§ 37H and 37H 1/2 please see the appropriate sections below.**

**Definitions Under M.G.L. c. 71, § 37H 3/4**

**Superintendent** – the Superintendent or designee for disciplinary purposes.

**Expulsion:** the removal of a student from the school premises, regular classroom activities, and school activities for more than ninety (90) consecutive school days.

**In-School Suspension:** the removal of a student from regular classroom activities, but not from the school premises, for no more than ten (10) consecutive school days, or no more than ten (10) school days cumulatively for multiple infractions during the school year. \*Removal solely from participation in extracurricular activities or school-sponsored events, or both, shall not count as removal in calculating school days.

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**Short-Term Suspension:** the removal of a student from the school premises and regular classroom activities for ten (10) consecutive school days or less. A principal may, in their discretion, allow a student to serve a short-term suspension in school. Removal solely from participation in extracurricular activities or school-sponsored events, or both, shall not count as removal in calculating school days.

**Long-Term Suspension:** the removal of a student from the school premises and regular classroom activities for more than ten (10) consecutive school days, or for more than ten (10) school days cumulatively for multiple disciplinary offenses in any school year. Removal solely from participation in extracurricular activities or school-sponsored events, or both, shall not count as removal in calculating school days. Except for students who are charged with a disciplinary offense set forth in M.G.L. c. 71, § 37H(a) or (b), or M.G.L. c. 71, § 37H ½ no student may be placed on long-term suspension for one or more disciplinary offenses for more than 90 school days in a school year beginning with the first day that the student is removed from school. No long-term suspension shall extend beyond the end of the school year in which such suspension is imposed.

**Principal:** the primary administrator of the school or the Principal's designee for disciplinary purposes.

**Written Notice:** Written correspondence sent by hand-delivery, certified mail, first-class mail, or email to an address provided by the parent for school communications, or any other method of delivery agreed to by the principal and the parent.

**Please note: these due process procedures apply to M.G.L. c. 71, § 37H ½ ONLY. For due process procedures for offenses under M.G.L. c. 71, §§ 37H and 37H 1/2 please see the appropriate sections below.**

All school principals and principal's designees and the Superintendent and Superintendent's designees when acting as a decision-maker at a disciplinary hearing or appeal to consider student discipline for violations of school rules other than offenses involving drugs, weapons, assaults on school staff and felony offenses, shall, when deciding the consequences for the student, consider ways to re-engage the student in the learning process. The principal or designee shall not suspend the student until alternative remedies have been employed, and their use and results documented unless specific reasons are documented as to why such alternative remedies would be unsuitable or counter-productive, or unless the student's continued presence in school would pose a specific, documentable concern about the infliction of serious bodily injury or other serious harm upon another person while in school. M.G.L. c. 71, § 37H 3/4(b).

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**Emergency Removals: M.G.L. c. 71, § 37H ½** - A principal may remove a student from school temporarily when a student ... (1)

To review the bullying prevention and intervention plan, please use the following link : [CPS Bullying Prevention and Intervention Plan](#).

The Chelmsford Public Schools is committed to providing a safe, positive, and productive educational environment where students can achieve the highest academic standards. No student shall be subjected to harassment, intimidation, bullying, or cyberbullying as articulated in the Bullying Intervention Plan. It is a violation of this policy for any student or member of a school staff including, but not limited to, an educator, administrator, school nurse, cafeteria worker, custodian, bus driver, athletic coach, advisor to an extracurricular activity or paraprofessional to engage in bullying, cyberbullying, or retaliation. Bullying is defined as the repeated use by one or more students or by a member of a school staff including, but not limited to, an educator, administrator, school nurse, cafeteria worker, custodian, bus driver, athletic coach, advisor to an extracurricular activity or paraprofessional of a written, verbal or electronic expression or a physical act or gesture or any combination thereof, directed at a victim that: (i) causes physical or emotional harm to the victim or damage to the victim's property; (ii) places the victim in reasonable fear of harm to himself or of damage to his property; (iii) creates a hostile environment at school for the victim; (iv) infringes on the rights of the victim at school; or (v) materially and substantially disrupts the education process or the orderly operation of a school. For the purposes of this section, bullying shall include cyberbullying. Bullying shall be prohibited: (i) on school grounds, property immediately adjacent to school grounds, at a school-sponsored or school-related activity, function or program whether on or off school grounds, at a school bus stop, on a school bus or other vehicle owned, leased or used by a school district or school, or through the use of technology or an electronic device owned, leased or used by a school district or school and (ii) at a location, activity, function or program that is not school-related, or through the use of technology or an electronic device that is not owned, leased or used by a school district or school, if the bullying creates a hostile environment at school for the victim, infringes on the rights of the victim at school or materially and substantially disrupts the education process or the orderly operation of a school.

It is a violation of the Plan for any employee of the Chelmsford Public Schools to condone or fail to report acts of bullying, cyberbullying, or retaliation that they witness or become aware.

#### Policies and Procedures for Reporting and Responding to Bullying and Retaliation

**A. Reporting bullying or retaliation.** Reports of bullying or retaliation may be made by staff, students, parents or guardians, or others, and may be oral or written. Oral reports made by or to a staff member shall be recorded in writing. Chelmsford Public Schools' staff member is required to report immediately to the principal or designee any instance of bullying or retaliation the staff member becomes aware of or witnesses. Reports made by students, parents or guardians, or other individuals who are not school or district staff members, may be made anonymously.

Use of an Incident Reporting Form is not required as a condition of making a report (See Appendix A). The school or district will: 1) include a copy of the Incident Reporting Form in the beginning of the year packets for

***Deleted:*** or for any employee of the Chelmsford Public Schools to condone or fail to report acts of bullying, cyberbullying, or retaliation that they witness or become aware of (i) on school grounds and property immediately adjacent to school grounds; (ii) at school sponsored or school-related activities, functions or programs whether on or off school grounds; (iii) at school bus stops; (iv) on school buses or other vehicles owned, leased or used by the school district; (v) through the use of technology or an electronic device owned, leased or used by the school district or (vi) at a location, activity, function or program that is not school related, or through the use of technology or an electronic device that is not owned, leased or used by a school district, if the bullying creates a hostile environment at school for the victim, infringes on the

students and parents or guardians, 2) make it available in the school's main office, the counseling office, the school nurse's office, and other locations determined by the principal or designee; and 3) post it on the school's website. The Incident Reporting Form will be made available in the most prevalent language(s) of origin of students and parents or guardians.

At the beginning of each school year, the school or district will provide the school community, including administrators, staff, students, and parents or guardians, with written notice of its policies for reporting acts of bullying and retaliation. A description of the reporting procedures and resources, including the name and contact information of the principal or designee, will be incorporated in student and staff handbooks, on the school or district website, and in information about the Plan that is made available to parents or guardians.

### **1. Reporting by Staff**

A staff member will report immediately to the principal or designee when he/she witnesses or becomes aware of conduct that may be bullying or retaliation. The requirement to report to the principal or designee does not limit the authority of the staff member to respond to behavioral or disciplinary incidents consistent with school or district policies and procedures for behavior management and discipline. In fact, if the staff member witnesses the incident, he/she will immediately call the student on that behavior in such a manner as to not escalate the situation.

### **2. Reporting by Students, Parents or Guardians, and Others**

The school or district expects students, parents or guardians, and others who witness or become aware of an instance of bullying or retaliation involving a student to report it to the principal or designee by either submitting the Incident Report Form, orally reporting the instance, or otherwise make the principal or designee aware of the instance. Reports may be made anonymously, but no disciplinary action will be taken against an alleged aggressor solely on the basis of an anonymous report. Students, parents or guardians, and others may request assistance from a staff member to complete a written report. Students will be provided practical, safe, private and age-appropriate ways to report and discuss an incident of bullying with a staff member, or with the principal or designee.

## **B. Responding to a report of bullying or retaliation.**

### **1. Safety**

Before fully investigating the allegations of bullying or retaliation, the principal or designee will take steps to assess the need to restore a sense of safety to the alleged target and/or to protect the alleged target from possible further incidents. Responses to promote safety may include, but not be limited to, creating a personal safety plan; predetermining seating arrangements for the target and/or the aggressor in the classroom, at lunch, or on the bus; identifying a staff member who will act as a "safe person" for the target; and altering the aggressor's schedule and access to the target. The principal or designee will take additional steps to promote safety during the course of and after the investigation, as necessary. The principal or designee will implement appropriate strategies for

retaliation, a student who has witnessed bullying or retaliation, a student who provides information during an investigation, or a student who has reliable information about a reported act of bullying or retaliation.

## **2. Obligations to Notify Others**

a. Notice to parents or guardians. Upon determining that bullying or retaliation has occurred, the principal or designee will promptly notify the parents or guardians of the target and the aggressor of this, and of the procedures for responding to it. There may be circumstances in which the principal or designee contacts parents or guardians prior to any investigation. Notice will be consistent with state regulations at 603 CMR 49.00.

b. Notice to Another School or District. If the reported incident involves students from more than one school district, charter school, non-public school, approved private special education day or residential school, or collaborative school, the principal or designee first informed of the incident will promptly notify by telephone the principal or designee of the other school(s) of the incident so that each school may take appropriate action. All communications will be in accordance with state and federal privacy laws and regulations, and 603 CMR 49.00.

c. Notice to Law Enforcement. At any point after receiving a report of bullying or retaliation, including after an investigation, if the principal or designee has a reasonable basis to believe that criminal charges may be pursued against the aggressor, the principal will notify the local law enforcement agency. Notice will be consistent with the requirements of 603 CMR 49.00 and locally established agreements with the local law enforcement agency. Also, if an incident occurs on school grounds and involves a former student under the age of 21 who is no longer enrolled in school, the principal or designee shall contact the local law enforcement agency if he or she has a reasonable basis to believe that criminal charges may be pursued against the aggressor.

In making this determination, the principal will, consistent with the Plan, the Memorandum of Understanding (MOU) with the Chelmsford Police Department and with applicable school or district policies and procedures, consult with the Chelmsford School District's "Law Enforcement Unit", if any, and other individuals the principal or designee deems appropriate.

**C. Investigation.** The principal or designee will investigate promptly all reports, whether oral or written, of bullying or retaliation and, in doing so, will consider all available information known, including the nature of the allegation(s) and the ages of the students involved.

During the investigation, the principal or designee will, among other things, interview students, staff, witnesses, parents or guardians, and others as necessary. The principal or designee (or whomever is conducting the investigation) will remind the alleged aggressor, target, and witnesses that retaliation is strictly prohibited and will result in disciplinary action.

Interviews may be conducted by the principal or designee, other staff members as determined

**Deleted:** Notice to Law Enforcement. At any point after receiving a report of bullying or retaliation, including after an investigation, if the principal or designee has a reasonable basis to believe that criminal charges may be pursued against the aggressor, the principal will notify the local law enforcement agency. Notice will be consistent with the requirements of 603 CMR 49.00 and locally established agreements with the local law enforcement agency. Also, if an incident occurs on school grounds and involves a former student under the age of 21 who is no longer enrolled in school, the principal or designee shall contact the local law enforcement agency if he or she has a reasonable basis to believe that criminal charges may be pursued against the aggressor

the extent practicable and given his/her obligation to investigate and address the matter, the principal or designee will maintain confidentiality during the investigative process. The principal or designee will maintain a written record of the investigation.

Procedures for investigating reports of bullying and retaliation will be consistent with school or district policies and procedures for investigations. If necessary, the principal or designee will consult with legal counsel about the investigation.

**D. Determinations.** The principal or designee will make a determination based upon all of the facts and circumstances. If, after investigation, bullying or retaliation is substantiated, the principal or designee will take steps reasonably calculated to prevent recurrence and to ensure that the target feels safe and is not restricted in participating in school or in benefiting from school activities. The principal or designee will: 1) determine what remedial action is required, if any, and 2) determine what responsive actions and/or disciplinary action is necessary.

Depending upon the circumstances, the principal or designee may choose to consult with the students' teacher(s) and/or school counselor, and the target's or aggressor's parents or guardians, to identify any underlying social or emotional issue(s) that may have contributed to the bullying behavior and to assess the level of need for additional social skills development.

The principal or designee will promptly notify the parents or guardians of the target and the aggressor about the results of the investigation and, if bullying or retaliation is found, what action is being taken to prevent further acts of bullying or retaliation. All notice to parents must comply with applicable state and federal privacy laws and regulations. Because of the legal requirements regarding the confidentiality of student records, the principal or designee cannot report specific information to the target's parent or guardian about the disciplinary action taken unless it involves a "stay away" order or other directive that the target must be aware of in order to report violations.

If the school principal or a designee determines that bullying or retaliation has occurred, the principal or designee shall inform the parents or guardians of the target about the Department of Elementary and Secondary Education's Problem Resolution System and the process for seeking assistance or filing a claim through the Problem Resolution System. Please see below for more information on how to seek assistance or file a claim through the problem resolution system.

#### **E. Responses to Bullying.**

##### **1. Teaching Appropriate Behavior Through Skills-building**

Upon the principal or designee determining that bullying or retaliation has occurred, the law requires that the school or district use a range of responses that balance the need for accountability with the need to teach appropriate behavior. M.G.L. c. 71, § 370(d)(2)(v). Skill building approaches that the principal or designee may consider include:  
--offering individualized skill-building sessions based on the school's/district's anti-bullying curricula;



consultation with guidance counselors and other appropriate school personnel;  
--implementing a range of academic and nonacademic positive behavioral supports to help students understand pro-social ways to achieve their goals;  
--meeting with parents and guardians to engage parental support and to reinforce the anti-bullying curricula and social skills building activities at home;  
--adopting behavioral plans to include a focus on developing specific social skills; or  
--making a referral for evaluation.

## 2. Taking Disciplinary Action

If the principal or designee decides that disciplinary action is appropriate, the disciplinary action will be determined on the basis of facts found by the principal or designee, including the nature of the conduct, the age of the student(s) involved, and the need to balance accountability with the teaching of appropriate behavior. Discipline will be consistent with the Plan and with the rubrics developed for each level. The rubrics are developed as a guide for principals or designees and do not prohibit them from using their discretion when assigning consequences. Discipline procedures for students with disabilities are governed by the federal Individuals with Disabilities Education Improvement Act (IDEA) and Section 504 of the Rehabilitation Act, which should be read in cooperation with state laws regarding student discipline. If the principal or designee determines that a student knowingly made a false allegation of bullying or retaliation, that student may be subject to disciplinary action.

## 3. Promoting Safety for the Target and Others

The principal or designee will consider what adjustments, if any, are needed in the school environment to enhance the target's sense of safety and that of others as well. One strategy that the principal or designee may use is to increase adult supervision at transition times and in locations where bullying is known to have occurred or is likely to occur. Within a reasonable period of time following the determination and the ordering of remedial and/or disciplinary action, the principal or designee will contact the target to determine whether there has been a recurrence of the prohibited conduct and whether additional supportive measures are needed. If so, the principal or designee will work with appropriate school staff to implement them immediately.

## Training and Professional Development

Assessing needs and resources. At least once every four years beginning with 2015-16 school year, the district will administer a Department of Elementary and Secondary-developed student survey to assess school climate and the prevalence, nature, and severity of bullying in our schools. Additionally, the school or district will annually report bullying incident data to the Department. Annual staff training on the Plan. At the building level, annual training for all school staff on the Plan will include staff duties under the Plan, an overview of the steps that the principal or designee will follow upon receipt of a report of bullying or retaliation, and an overview of the bullying prevention curricula to be offered at all grades throughout the school or district. Staff members hired after the start of the school year are required to participate in school-based training during the school year in which they are hired, unless they can demonstrate participation in an acceptable and comparable program within the last two years.

understanding of tools necessary for staff to create a school climate that promotes safety, civil communication, and respect for differences. Professional development will build the skills of staff members to prevent, identify, and respond to bullying. As required by law, the content of school-wide and district-wide professional development will be informed by research and will include information on:

- developmentally/age-appropriate strategies to prevent bullying;
- developmentally/age-appropriate strategies for immediate, effective interventions to stop bullying incidents;
- information regarding the complex interaction and power differential that can take place between and among an aggressor, target, and witnesses to the bullying;
- research findings on bullying, including information about specific categories of students who have been shown to be particularly at risk for bullying in the school environment.
- information on the incidence and nature of cyberbullying; and
- Internet safety issues as they relate to cyberbullying.

Professional development will also address ways to prevent and respond to bullying or retaliation for students with disabilities that must be considered when developing students' Individualized Education Programs (IEPs). This will include a particular focus on the needs of students with autism or students whose disability affects social skills development.

## Non-Discrimination

It is the policy of the Chelmsford Public Schools not to discriminate on the basis of sex, sexual orientation, gender identity, pregnancy or parenting status, race, religion, color, disability, immigration status, age or national origin in its educational programs, activities or employment policies as required by Title IX of the 1972 Educational Amendments and Chapter 622 of the Acts of 1971. The District also does not discriminate against individuals on the basis of homelessness in a manner consistent with the McKinney-Vento Act. The District shall evaluate, on an annual basis, all aspects of the K through 12 school programs to ensure that all students regardless of sex, sexual orientation, gender identity, pregnancy or parenting status, race, religion, color, disability, immigration status, age, homelessness or national origin are given an opportunity to participate in all programs offered by the school including athletics and other extra-curricular activities.

Complaints which allege misconduct meeting the definition of sexual harassment under Title IX, will be addressed pursuant to the District's Title IX policy. Inquiries regarding compliance with Title IX may be directed to the Coordinator of Title IX and Chapter 622, 230 North Road, Chelmsford, MA 01824. Telephone (978) 251-5100, extension 6904.

Any student or school employee who feels that he/she has been discriminated against for any of the reasons cited above should refer to the District's grievance procedures found on the [District's website](#).

Students found to have engaged in discrimination, harassment, or retaliation may be subject to discipline, up to and including removal from the educational setting.

Students, parents, or employees who choose not to use the District's internal non-discrimination

**Deleted:** It is the responsibility of every employee, student and parent/guardian to recognize acts of bullying, cyberbullying and retaliation against students and take every action necessary to ensure that the applicable policies and procedures of the Chelmsford Public Schools are implemented. Any student who believes that he or she has been subjected to bullying and/or cyberbullying has the right to: (i) file a complaint to his/her teacher or principal and to (ii) receive prompt and appropriate handling of the complaint. Further, all reasonable efforts shall be made to maintain the confidentiality and protect the privacy of all parties, but proper enforcement of this policy may require disclosure of any and all information received. A report of bullying or retaliation may be made anonymously, provided that no disciplinary action shall be taken against the student solely on the basis of such report.

Students, parents, and Chelmsford Public Schools' employees (including but not limited to educators, administrators, school nurses, paraprofessionals, cafeteria workers, custodians, van drivers, van monitors), who witness or become aware of bullying, cyberbullying or retaliation should immediately report it to the principal. The Chelmsford Public Schools will not tolerate retaliation against a person who reports bullying or cyberbullying, provides information during an investigation of bullying or cyberbullying, or witnesses or has reliable information about bullying or cyberbullying.

The principal or designee will investigate promptly all reports of bullying or retaliation and, in doing so, will consider all available information known, including the nature of the allegation(s) and the ages of the students involved.

During the investigation the principal or designee will, among other things, interview students, staff, witnesses, parents or guardians, and others as necessary. The principal or designee (or whomever is conducting the investigation) will remind the alleged aggressor, target, and witnesses that retaliation is strictly prohibited and will result in disciplinary action. Interviews may be conducted by the principal or designee, other staff members as determined by the principal or designee, and in consultation with the school counselor, as appropriate. To the extent practicable and given his/her obligation to investigate and address the matter, the principal or designee will maintain confidentiality during the investigative process. The principal or designee will maintain a written record of the investigation. Procedures for investigating reports of bullying and retaliation will be consistent with school or district policies and procedures for investigations. If necessary, the principal or designee will consult with legal counsel about the investigation.

The principal or designee will make a determination based upon all of the facts and circumstances. If, after investigation, bullying or retaliation is substantiated, the principal or designee will take steps reasonably calculated to prevent recurrence and to ensure that the target is not restricted in participating in school or in benefiting from school activities. The principal or designee will: 1) determine what remedial action is required, if any, and 2) determine what responsive actions and/or disciplinary action is necessary.

Depending upon the circumstances, the principal or designee may choose to consult with the students' teacher(s) and/or school counselor, and the target's or aggressor's parents or guardians, to identify any underlying social or emotional issue(s) that may have contributed to the bullying behavior and to assess the level of need for additional social skills development.

parents or guardians of the target and the aggressor about the results of the investigation and, if bullying or retaliation is found, what action is being taken to prevent further acts of bullying or retaliation. All notice to parents must comply with applicable state and federal privacy laws and regulations. Because of the legal requirements regarding the confidentiality of student records, the principal or designee cannot report specific information to the target's parent or guardian about the disciplinary action taken unless it involves a "stay away" order or other directive that the target must be aware of in order to report violations.

If the school principal or a designee determines that bullying or retaliation has occurred, the principal or designee shall inform the parents or guardians of the victim about the department's problem resolution system and the process for seeking

complaint of discrimination, harassment, or retaliation with an appropriate state or federal agency, including the following listed agencies.

Massachusetts Commission Against Discrimination (MCAD),  
One Ashburton Place, Boston, MA 02108  
Telephone: (617) 994-6000

[mcad@mass.gov](mailto:mcad@mass.gov)

***And/or***

Office for Civil Rights  
5 Post Office Square, 8<sup>th</sup> Floor  
Boston, MA 02109  
Telephone: (617) 289-0150

[OCR.Boston@ed.gov](mailto:OCR.Boston@ed.gov)

## **CURRICULUM INCLUSIVITY**

Consistent with Massachusetts regulations, 603 CMR 26.05(1), the Chelmsford Public Schools, through its curricula and materials, encourages respect for the human and civil rights of all individuals, regardless of race, color, sex, gender identity, religion, national origin or sexual orientation. In accordance with district guidelines, families may request information from the building principal on available accommodations related to curriculum content.

### *Section 504 of the Rehabilitation Act of 1973*

#### **SERVICES AND ACCOMMODATIONS FOR STUDENTS WITH DISABILITIES**

Some students with disabilities require specialized instruction and/or supportive services to help them make effective progress in school.

Section 504 of the Rehabilitation Act of 1973 ("Section 504") provides: "No otherwise qualified individual with a disability in the United States . . . shall, solely by reason of her or his disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance." Pursuant to Section 504, any qualified student with a disability is entitled to a free appropriate public education (FAPE). Section 504 FAPE is the provision of regular or special education and related aids and services designed to meet a student's individual educational needs as adequately as the needs of nondisabled students are met.

Under the Individuals with Disabilities Education Act ("IDEA") and M.G.L. c. 71B, some students with disabilities may be eligible for services if they require specialized instruction and/or supportive services to help them make effective progress in school. These services can include, but are not limited to: speech therapy, physical therapy, occupational therapy, specialized instruction,

Department for an evaluation of eligibility for special education services. Within five (5) school days of such a referral, a consent form authorizing an evaluation of the student will be forwarded to the parent(s). Within forty-five (45) school days of receipt of the parent(s)' consent, an evaluation will be conducted, and a Team meeting will be held to determine if the student is eligible for special education services. If the student is found eligible for special education services, the Team will develop an Individualized Education Program (IEP) identifying the necessary services.

In some cases, the evaluation Team determines that a student with a disability may require only individual accommodations as opposed to specially designed instruction and /or related services. Such students may then be referred for an evaluation of their eligibility for an individual accommodation plan in accordance with Section 504 of the Rehabilitation Act.

For more information regarding the services available to students with disabilities please contact the Section 504 Compliance Officer:

Amy Reese, Director of Student Services  
reesea@chelmsford.k12.ma.us  
200 Richardson Road  
North Chelmsford, MA 01863  
978-251-5100 X6919

### Transgender and Non-Conforming Students

The Chelmsford Public Schools strives to provide a safe, respectful, and supportive learning environment in which all students can thrive and succeed in its schools. The Chelmsford Public Schools prohibits discrimination on the basis of race, color, national origin, sex, sexual orientation, gender identity, pregnancy or pregnancy status, disability, homelessness, religion, age or immigration status. The Chelmsford Public Schools is also committed to maintaining a school environment free of harassment based on race, color, religion, national origin, sex, gender, sexual orientation, gender identity, pregnancy or pregnancy status, age, genetic information, ethnic background, ancestry, disability, or any category protected by state or federal law.

Understanding the terminology associated with gender identity is important to providing a safe and supportive school environment for students whose rights are protected under the law. The following terms are defined to assist in understanding the guidance presented.

Although these are the most commonly used terms, students may prefer other terms to describe their gender identity, appearance, or behavior.

Gender expression: the manner in which a person represents or expresses gender to others, often through behavior, clothing, hairstyles, activities, voice, or mannerisms.

Gender identity: a person's gender-related identity, appearance or behavior, whether or not that gender-related identity, appearance or behavior is different from that traditionally associated with the person's physiology or assigned sex at birth.

**Deleted:** Section 504 is an Act which prohibits discrimination against a person with a handicap in any program receiving federal financial assistance. The act defines a person with a handicap as anyone who:  
has a mental or physical impairment which substantially limits one or more major life activities (major life activities include activities such as caring for oneself, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, and working)  
is regarded as having such an impairment.  
The Chelmsford Public Schools recognizes a responsibility to avoid discrimination in policies and practices regarding its personnel and students. No discrimination against any person with a handicap will knowingly be permitted in any of the programs and practices of the school system.  
The school district has specific responsibilities under the Act, which include the responsibility to identify, evaluate, and if the child is determined to be eligible under Section 504, to afford access to appropriate educational services.

If the parents or guardian disagrees with the determination of the professional staff of the school district, he/she has the right to a hearing with an impartial hearing officer.  
Parents and/or guardians of a student should contact the Coordinator of Section 504: Director of Student Services at 230 North Road, Chelmsford, MA 01824.

**Deleted:** sex, gender identity, religion, disability, national origin, age, or sexual orientation and ensures that all students have equal rights of access and equal enjoyment of the opportunities, advantages, privileges, and courses of study.

stereotypic expectations. The terms “gender variant” or “gender atypical” are also used.

**Transgender:** an umbrella term used to describe a person whose gender identity or gender expression is different from that traditionally associated with the assigned sex at birth.

**Transition:** the process in which a person goes from living and identifying as one gender to living and identifying as another. Transition is a process that is different for everyone, and it may or may not involve social, legal, or physical changes.

## **STUDENT TRANSITIONS**

A student chooses when to transition. Regardless of the timing of a student’s transition, the school shall act in accordance with the following age-appropriate guidelines.

**ELEMENTARY SCHOOL:** Generally, it will be the parent or guardian that informs the school of the impending transition or if the student has already transitioned. However, it is not unusual for a student’s desire to transition to first surface at school. If school staff believe that a gender identity or expression issue is presenting itself and creating difficulty for the child at school, approaching parents about the issue is appropriate at the elementary level, after discussion with the student to ensure the prospect of such a conversation with the parent does not provoke fear in the child. Together, the family and school can then identify appropriate steps to support the student.

**SECONDARY SCHOOL:** Generally, notification of a student’s parent about his or her gender identity, expression or transition is unnecessary, as they are already aware and may be supportive. In some cases, however, notifying parents carries risks for the student. Prior to notification of any parent or guardian regarding the transition process, school staff should work closely with the student to assess the degree to which, if any, the guardian will be involved in the process and must consider the physical and mental health, well-being, and safety of the transitioning student.

When a student is transitioning, notifies the school of a plan to transition, or has already transitioned, the school shall offer to meet with the student (and parents if they are involved in the process) to ascertain desires and concerns, and to discuss a plan that will create the conditions supporting a safe and accepting environment at the school for the student. This plan may include items such as: the student’s chosen name and pronoun; a plan to initiate the use of the student’s chosen name and pronoun within school; communication between the school and the parent/guardian; name and gender markers in the student record; and the student’s right to use restrooms, locker rooms or changing facilities, in accordance with the policy outlined below.

## **PRIVACY**

Under state law, information about a student's assigned birth sex, name change for gender identity purposes, gender transition, medical or mental health treatment related to gender identity, or any other information of a similar nature, regardless of its form, is part of the individual's student record, is confidential, and must be kept private and secure, except in limited circumstances. See 603 CMR § 23.04. The federal Family Educational Rights and Privacy Act also protects the privacy of education

teaching, counseling, or other services to the student in the performance of their official duties. When a student new to a school is using a chosen name, the birth name is considered private information and may be disclosed only with authorization as provided under the Massachusetts Student Records Regulations. If the student has previously been known at school or in school records by his or her birth name, the Principal should direct school personnel to use the student's chosen name. Every effort should be made to update student records (for example, Individualized Education Programs) with the student's chosen name and not circulate records with the student's assigned birth name. Records with the student's assigned birth name should be kept in a separate, confidential file.

Transgender and gender nonconforming students have the right to discuss and express their gender identity and expression openly and to decide when, with whom, and how much to share private information. The fact that a student chooses to disclose their transgender status to staff or other students does not authorize school staff to disclose other medical information about the student. A student who is 14 years of age or older, or who has entered the ninth grade, may consent to disclosure of information from his or her student record. If a student is under 14 and is not yet in the ninth grade, the student's parent (alone) has the authority to decide on disclosures and other student record matters.

#### OFFICIAL RECORDS

Changes of a student's name and/or gender marker within the student records should be made upon request of the student and/or parent/guardian, depending on the student's age/grade, as set out in the student records regulations. 603 CMR 23.01; 603 CMR 23.08. For students under 14 years old and who have not entered ninth grade, only the parent/guardian may request the change. For students who are 14-17 years old, or who have entered ninth grade, the parent and the student may either alone or together make decisions about the student record. Any student 18 years or older who is not under guardianship may make the request. Massachusetts recognizes common law name changes, which means that anyone can use their chosen name for an honest purpose. Therefore, when requested to do so, the school will record the student's chosen name and gender marker on all records, whether or not the student, parent or guardian provides the school with a court order formalizing a name change. If a change is made to the student's name and/or gender marker in the student record, the school should keep the records that contain the student's birth name and/or gender in a separate, confidential file.

#### NAMES AND PRONOUNS

Every student has the right to be addressed by a name and pronoun that corresponds to the student's gender identity. A court-ordered name or gender change is not required, and the student need not change his or her official records to be afforded the respect of having school staff use the pronoun requested. It is strongly recommended that a trained staff member privately ask transgender or gender nonconforming students at the beginning of the school year how they want to be addressed in class, in the school's correspondence to the home, and at conferences with the student's parent/guardian. In accordance with the student's desires, the staff member should disseminate the student's chosen name and pronoun to other staff who may be in regular contact with the student and/or the student's home, to ensure the student is appropriately addressed and referred to. As noted above, this conversation about the student's chosen name and pronoun should be part of the initial planning meeting with the student.

**Deleted:** All persons, including students, have a right to privacy, and this includes the right to keep one's transgender status private at school. Protecting the privacy of transgender and gender nonconforming students must be a top priority for staff. Information about a student's transgender status, legal name, or gender assigned at birth may constitute confidential medical information. Disclosing this information to other students, the student's parents, or other third parties may violate privacy laws, such as the federal Family Educational Rights and Privacy Act. ¶

**Deleted:** Also, to prevent a breach of confidentiality, *unless the student,* ¶

¶  
¶  
¶  
¶

*parent, or guardian has specified otherwise,* school staff should use the student's legal name and the pronoun corresponding to the student's gender assigned at birth when communicating with the parent or guardian of a transgender student. ¶

## **FACILITIES**

With respect to all restrooms, locker rooms or changing facilities, students shall have access to facilities that correspond to their gender identity. Schools shall allow students to access the restroom, locker room or changing facilities consistent with their gender identity.

In any gender segregated facility, any student who is uncomfortable using a shared facility, regardless of the reason, shall, upon the student's request, be provided with a safe and non-stigmatizing alternative. This may include, for example, addition of a privacy partition or curtain, provision to use a nearby private restroom or office, or a separate changing schedule.

Under no circumstances may students be required to use sex segregated facilities that are inconsistent with their gender identity.

Where available, schools are encouraged to designate facilities designed for use by one person at a time as accessible to all students regardless of gender, and to incorporate such single user facilities into new construction or renovation. However, under no circumstances may a student be required to use such facilities because they are transgender or gender nonconforming.

## **PHYSICAL EDUCATION CLASSES AND INTRAMURAL AND INTERSCHOLASTIC ATHLETICS**

All students shall be permitted to participate in physical education classes and intramural sports in a manner consistent with their gender identity. Furthermore, unless precluded by state interscholastic association policies, all students shall be permitted to participate in interscholastic athletics in a manner consistent with their gender identity.

## **OTHER GENDER-BASED ACTIVITIES, RULES, POLICIES AND PRACTICES**

As a general matter, schools should evaluate all gender-based activities, rules, policies, and practices — including but not limited to classroom activities, extra-curricular activities, school ceremonies, school photos, and documentation requests, such as field trip permission forms - and maintain only those that have a clear and sound pedagogical purpose and do not violate anti-discrimination law. Students shall be permitted to participate in any such activities or conform to any such rule, policy, or practice consistent with their gender identity.

## **DRESS CODE**

Schools may enforce dress codes pursuant to district policy. Students shall have the right to dress in accordance with their gender identity, within the constraints of the dress codes adopted by the school. School staff shall not enforce a school's dress code more strictly against transgender and gender nonconforming students than other students.

## **PROFESSIONAL DEVELOPMENT**

The administration shall conduct training for all staff members on their responsibilities under applicable laws and this policy, including teachers, administrators, counselors, social workers, and health staff. Information regarding this policy shall be incorporated into training for new school employees. The administration shall implement ongoing professional development to build the skills of all staff members to prevent, identify and respond to bullying, harassment and discrimination that may result from gender identity matters.



(i) terms, concepts, and current developmental understandings of gender identity, gender expression, and gender diversity in children and adolescents.

(ii) developmentally appropriate strategies for communication with students and parents about issues related to gender identity and gender expression that protect student privacy and safety.

### References

Massachusetts General Law Chapter 4 Section 7 – Definitions of Statutory Terms

Massachusetts General Law Chapter 76, § 5 – School Attendance: Discrimination

603 CMR 26.00 – Access to Equal Education Regulations

603 CMR 23.00 – Massachusetts Student Records Regulations

Massachusetts Department of Elementary and Secondary Education, *Guidance for Massachusetts Public Schools: Creating a Safe and Supporting School Environment – Nondiscrimination on the Basis of Gender Identity*

P5303 – [Anti-discrimination policy]

### Student Study Team

#### Student Study Team

A Student Study Team is available to assist students with regular education interventions. Further information regarding the special education referral and evaluation process may be obtained from the Office of the Director of Student Services.

### Student Records

The Family Educational Rights and Privacy Act (FERPA) and the Massachusetts Student Records regulations (603 CMR 23.00) provide parents and eligible students certain rights with respect to a student's education records. A general overview of those rights is provided below. Parents and eligible students may obtain a complete copy of their rights by contacting the Principal.

Massachusetts regulations related to student records (603 CMR 23.00) ensure a student's (and their parents') rights of inspection, amendment, destruction, and confidentiality related to their records.

Under 603 CMR 23.01, the rights related to student records belong to the student's parent if the student is under the age of fourteen (14) and has not started the ninth grade. Upon reaching the age of fourteen (14) or upon starting the ninth grade (whichever occurs first), both the student and their parent retain the rights related to student records. Either the student or the parent can exercise these rights independently. Once the student reaches the age of eighteen (18), the student exclusively retains the rights related to student records and only they can exercise such rights if they expressly limit the rights of their parent, exclusive of the right to inspect. If a student wishes to limit the rights which are held by their parent, they must make the request to the Principal or Superintendent in writing. A parent always maintains the right to inspect the student record.

recording and computer tapes, microfilm, microfiche, or any other materials regardless of physical form or characteristics concerning a student that is organized on the basis of the student's name or in a way that such student may be individually identified, and that is kept by the public schools of the Commonwealth as defined under state law. The regulations divide the record into two sections, the transcript and the temporary record. The transcript includes only the minimum information necessary to reflect the student's educational progress. This information includes the name, address, course titles, grades, credits, and grade levels completed. The transcript is kept by the school system for at least sixty years after the student leaves the system.

1. Inspection of Records

A parent, or a student who has entered the ninth grade or is at least fourteen years old (eligible student), has the right to inspect the student record upon request. The record must be made available to the parent or eligible student no later than ten days after the request unless the parent or eligible student consents to a further delay. The parents or eligible student has the right to receive copies of any part of the student record. The district may charge a fee at the district rate for such copying, not to exceed the costs of reproduction, unless the charging of such fee would effectively prevent the parents or eligible student from exercising their federal rights to inspect and review the records. Finally, the parents or eligible student may request to have the record interpreted by a professionally qualified

school employee. Parents and eligible students should submit their request to access/inspection to the Principal.

2. Confidentiality of Records

With a few exceptions, no individual or organization other than the parent, student, and authorized school personnel are allowed to have access to information in the student record without the specific, informed, written consent of the parent or eligible student.

3. Amendment of Records

The parent and the eligible student have the right to add relevant comments, data, information, or other relevant written materials to the student record. In addition, the parent and eligible student have the right to request that certain information in the record be amended or deleted. The parent and eligible student have a right to request a conference with the Principal or her/his designee to make their objections known. Within a week after the conference, the Principal or their designee must render a decision on such a request in writing. If the parent and/or eligible student are not satisfied with the decision, the regulations contain provisions through which the decision may be appealed to higher authorities in the school. Directory Information - Federal law requires that the District release the names, addresses, and telephone listings of students to military recruiters and institutions of higher education upon request for recruitment and scholarship purposes without prior consent. In addition, the school may release the following directory information about a student without prior consent: a student's name, address, major fields of study, dates of attendance, weight and height of members of athletic teams, class participation in officially recognized activities and sports, honors and awards, and directory

that such directory information not be released without prior consent by notifying the Principal in writing by the end of September of each school year.

4. Destruction of Records

The regulations require that certain parts of the student record, such as the temporary record, be destroyed within a certain period of time after the student leaves the school system. In addition, school authorities are allowed to destroy misleading, outdated, or irrelevant information in the student record from time to time while the student is enrolled within the school system. Before any such information may be destroyed, the parent and eligible student must be notified and have an opportunity to receive a copy of any of the information before its destruction.

5. Transfer of Records

In accordance with 603 CMR 23.07(4)(g), it is the practice of the Chelmsford Public Schools to forward the student record of any student who seeks or intends to enroll, or already has enrolled in another public school district, if the disclosure is for the purposes of the student's enrollment or transfer. The parent or eligible student has the right to receive a copy of the school record that is forwarded to the new school.

6. Non-Custodial Parents - Unless there is a court order to the contrary, a non-custodial parent (parent without physical custody of the student) of any public-school student has the right, subject to certain procedures, to receive information regarding the student's achievements, involvement, behavior, etc. A non-custodial parent who wishes to have this information shall submit a written request annually to the child's school principal. Upon receipt of such a request, the principal shall send written notification to the custodial parent by certified and first-class mail that the records and information will be provided to the non-custodial parent in twenty-one (21) calendar days unless the custodial parent provides documentation of the non-custodial parent's ineligibility to access such information. In all cases where school records are provided to a non-custodial parent, the electronic and postal address and other contact information for the custodial parent shall be removed from the records provided. Any such records provided to the non-custodial parent shall be marked to indicate that they may not be used to enroll the student in another school. Upon receipt of a court order that prohibits the distribution of information pursuant to M.G.L. c. 71, §34H, the school will notify the non-custodial parent that it shall cease to provide access to the student record to the non-custodial parent. M.G.L. c. 71, §34H; 603 CMR 23.07.

7. Third Party Access - Authorized school personnel, to include: (a) school administrators, teachers, counselors and other professionals who are employed by the school committee or who are providing services to the student under an agreement between the school

administrative, teaching, counseling, and/or diagnostic capacity; (b) administrative office staff and clerical personnel, employed by the school committee or under a school committee service contract, and whose duties require them to have access to student records for purposes of processing information for the student record; and (c) the evaluation team which evaluates a student, shall have access to the student record of students to whom they are providing services, when such access is required in the performance of their official duties. The consent of the parent or eligible student shall not be necessary.

8. **Complaints** - A parent or eligible student has a right to file a complaint with the Student Privacy Policy Office, U.S. Department of Education, 400 Maryland Avenue SW, Washington, D.C. 20202-8520, 1-855-249-3072 or with the Massachusetts Department of Elementary and Secondary Education, 135 Santilli Highway, Everett, MA 02149; 781-338-3000. If you have any questions regarding this notice or would like more information and/or a copy of the Massachusetts Department of Elementary and Secondary Education Student Record Regulations, please contact the building principal.

#### **Protection of Pupil Rights Amendment Act**

The Protection of Pupil Rights Amendment (PPRA) affords parents certain rights regarding the school's conducting of surveys, the collection and use of information for marketing purposes, and certain physical exams. These include the right to:

- *Consent* before students are required to submit to a survey that concerns one or more of the following protected areas ("protected information survey") if the survey is funded in whole or in part by a program of the U.S. Department of Education (ED)–

1. Political affiliations or beliefs of the student or student's parent;
2. Mental or psychological problems of the student or student's family;
3. Sex behavior or attitudes;
4. Illegal, anti-social, self-incriminating, or demeaning behavior;
5. Critical appraisals of others with whom respondents have close family relationships;
6. Legally recognized privileged relationships, such as with lawyers, doctors, or ministers;
7. Religious practices, affiliations, or beliefs of the student or student's parent; or
8. Income, other than as required by law to determine program eligibility.

**F. Receive notice and an opportunity to opt a student out of–**

2. Any non-emergency, invasive physical exam or screening required as a condition of attendance, administered by the school or its agent, and not necessary to protect the immediate health and safety of a student, except for hearing, vision, or scoliosis screenings, or any physical exam or screening permitted or required under State law; and
3. Activities involving collection, disclosure, or use of personal information collected from students for marketing or to sell or otherwise distribute the information to others. (This does not apply to the collection, disclosure, or use of personal information collected from students for the exclusive purpose of developing, evaluating, or providing educational products or services for, or to, students or educational institutions.)

• *Inspect*, upon request and before administration or use –

1. Protected information surveys of students and surveys created by a third party;
2. Instruments used to collect personal information from students for any of the above marketing, sales, or other distribution purposes; and
3. Instructional material used as part of the educational curriculum.

These rights transfer from the parents to a student who is 18 years old.

Chelmsford Public Schools will develop and adopt policies, in consultation with parents/guardians, regarding these rights, as well as methods to protect student privacy in the administration of protected information surveys and the collection, disclosure, or use of personal information for marketing, sales, or other distribution purposes. The school will directly notify parents of these policies at least annually at the start of each school year and after any substantive changes. The school will also directly notify, such as through U.S. Mail or email, parents of students who are scheduled to participate in the specific activities or surveys noted below and will provide an opportunity for the parent to opt his or her child out of participation in the specific activity or survey. The school will make this notification to parents at the beginning of the school year if the school has identified the specific or approximate dates of the activities or surveys at that time. For surveys and activities scheduled after the school year starts, parents will be provided reasonable notification of the planned activities and surveys listed below and be provided an opportunity to opt their child out of such activities and surveys. Parents will also be provided an opportunity to review any pertinent surveys.

Specific activities and surveys covered under this requirement include: the collection, disclosure, or use of personal information for marketing, sales or other distribution; the administration of any protected information survey not funded in whole or in part by DOE, and any non-emergency, invasive physical examination or screening as described above.

Parents who believe their rights under PPRA have been violated may file a complaint with:

Family Educational Rights and Privacy Act Office  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, D.C. 20202-5901

#### *Parents Right to Know - Teacher Qualifications*

Several schools in Chelmsford receive Title I funds from the federal government. These funds support funding for the early intervention reading program providing supportive reading services to grade 1 students. Federal law has established the right of parents at schools served by Title I funding to know the professional qualifications of the classroom teachers who instruct your child. Please be assured however, that the Chelmsford Public Schools have been very successful in obtaining highly qualified certified teachers for teaching positions.

In compliance with federal regulations, we would like you to be aware that federal law allows you to ask for certain information about your child's classroom teachers and requires us to give you this information in a timely manner if you ask for it. Specifically, you have the right to ask for the following information about each of your child's classroom teachers:

1. whether the teacher has met state qualification and licensing criteria for the grade levels and subject areas in which the teacher provides instruction;
2. whether the teacher is teaching under emergency or other provisional status through which state qualification or licensing criteria have been waived;
3. whether the teacher is teaching in the field of discipline of the certification of the teacher; and
4. whether the student is provided services by paraprofessionals and, if so, their qualifications.
5. If you would like to receive any of this information, please call the Director of Human Resources at 978-251-5100, ext. 6904.

#### *CPS Student Empowered Digital Use Guidelines*

##### **Technology/Internet Acceptable Use**

As technology becomes increasingly integral to instruction and educational services at Chelmsford Public Schools, we recognize that students will be accessing technology in various ways during their

Chelmsford Public Schools has developed and continuously

updates policies and protocols to guide its use. All School Committee policies can be found [HERE](#).

Technology specific guidelines are contained both on the School Committee policy website, and within this document. The CPS Student Empowered Digital Use Guideline is the overarching technology acceptable use policy for students. If at any time any user is unclear about technology use guidelines, please call or email the Director of Information Communication and Technology Services with your question.

Chelmsford Public Schools recognizes the need for students to be prepared to contribute to and excel in a connected, global community. To that end, the district provides ongoing student instruction intended to develop digital citizenship skills and emphasize the appropriate and ethical use of technology. Information and communication technology are an integrated part of our curriculum across subjects and grades in developmentally appropriate ways, aligned with the Massachusetts Curriculum Frameworks and standards, including seeking knowledge and understanding; thinking critically and solving problems; listening, communicating, and interacting effectively; and engaging and competing in a global environment.

The Superintendent or designee shall implement, monitor, and evaluate the district's system/network for instructional and administrative purposes.

All users shall acknowledge they understand that using digital devices on the school district network is a privilege and when using them in accordance with School District guidelines, they will retain that privilege. Misuse of district devices or network can and will end with disciplinary measures, including but not limited to prohibition from using the school district network. Please see a [list of possible disciplinary measures](#) that may be taken for violations of this or any classroom technology policy.

Any use of the District's devices and/or network must abide by the policies of the Chelmsford Public Schools, including the CPS Student Empowered Digital Use Guideline, and applicable state and federal law. Any violation may result in loss of privilege to use the District's devices and/or network, and/or disciplinary sanctions. A user also violates school rules by failing to report any violations by other users that come to the attention of the user. Further, a user violates school rules if he or she permits another to use his or her account or password to access the District's devices and/or network.

Any devices and/or network issued or owned by the District, including email, are the property of the Chelmsford Public Schools, and students do not have an expectation of privacy as to their use of such devices and/or network, including, but not limited to, any information accessed, stored, or transmitted on, with, or during use of the information technology. The Chelmsford Public Schools reserves the right to monitor, inspect, copy, review, and store at any time, and without prior notice, any and all usage of its devices and network, and any and all information accessed, stored, transmitted, or received in connection with such usage. All



Public Schools.

The Superintendent or designee shall develop and implement administrative guidelines, regulations, procedures, and user agreements, consistent with law and policy, which shall include but not be limited to the following:

- Digital devices, software, and networks shall be used in school for educational purposes and activities;
- An individual's personal information (including home/mobile phone numbers, mailing addresses, and passwords) and that of others shall be kept private;
- Individuals will show respect for themselves and others when using technology including social media;
- Users shall give acknowledgment to others (people, sources, tools including AI (Artificial Intelligence), for their ideas and work;
- Users shall report inappropriate use of technology immediately.

These procedures shall be frequently reviewed by the district and shall provide a springboard for teaching and learning around topics such as internet safety, digital citizenship, appropriate communication strategies, and ethical use of technology.

Please reference the [CPS Student Empowered Digital Use Guidelines](#) document for further information regarding each topic:

- Safe and Responsible Use
- Access to Digital Resources
- Removal of BYOD
- Academic Integrity
- Video Surveillance
- Social Media & Communication
- Chromebook/Device Distribution
- Chromebook/Device Care and Maintenance
- Chromebook/Device Usage Expectations at School
- Chromebook/Device Usage Expectations Outside of School
- Audio/Video Recording and Photos
- Saving to the Chromebook/Device
- Network Connectivity

- Parent/Guardian Responsibilities
- Loss, Theft, or Damage

Empowered Digital Use & Chromebook/Device Agreement Form

### *Search and Seizure*

The Chelmsford Public Schools has the right to inspect school property at its discretion, including a student's locker or desk, a school-issued laptop, school-issued email, and/or the student's use of the school's network.

#### **Lockers/Desks**

If a locker or desk is issued to students by the Chelmsford Public Schools, such lockers and desks are school property, and the school reserves the right to search them at any time. Students have no expectation of privacy in the contents of their lockers or desks.

1. Lockers and desks are the property of Chelmsford Public Schools. The Chelmsford Public Schools maintains control of all locks affixed to lockers. No other locks are permitted, and such locks will be removed by school officials.
2. Students shall not have any expectation of privacy in school lockers and desks and should be aware that school lockers and desks may be searched at any time by school officials.
3. It is prohibited to store any items/substances in violation of any school rule or Federal, State, or Local law in a locker or desk.
4. Items/substances prohibited from being in school, including in lockers and desks, include but are not limited to: guns/knives/weapons (real or fake), drugs and/or alcohol, fireworks/explosives, fire/smoke/odor producing products, and any other item or material which may disrupt the educational environment or present threat of harm to students and/or school staff.

#### **Electronic Devices**

School issued laptops, as well as any other device issued by the Chelmsford Public Schools, and the Chelmsford Public Schools' network (including email), are the property of Chelmsford Public Schools, and students do not have an expectation of privacy as to their use of the school-issued devices laptop and/or network, including but not limited to, any information accessed, stored, or transmitted on, with, or during use of the school issued device or network.

#### **Search of Students and Their Belongings**

1. A Search of a student's person, personal possessions (including personal electronic devices), automobile on school property, will only be performed by school administrators, where there exists reasonable suspicion that the search will produce evidence that the student has violated or is violating either the law or the rules of the school. The search will be conducted in a manner reasonably related to its objectives and will not be excessively intrusive in light of the age and

necessary, the student shall be advised of the reason for the search prior to its implementation. A search of a student may extend to but is not limited to: articles of clothing such as pockets; removal and search of outer garments such as hats/caps/head-gear, jackets, coats, sweaters, sweatshirts, or shoes; and to items such as pocketbooks, lunch bags, book bags, athletic bags, backpacks, and personal electronic devices. The consent of the student or a parent/guardian shall not be required prior to conducting a search of a student or the student's belongings. Students found in possession of prohibited items or materials may be subject to disciplinary action and/or criminal prosecution.

2. If the student fails to comply with a search, the student may be detained until the student's parents, and, if necessary, the police, can arrive at the school. Students who impede or refuse to comply with a search may be subject to disciplinary consequences, including a short or long-term suspension from school.

In the event of a search of a student or their belongings, parents will be notified of the search and the results thereof as soon as practicable. Except under exigent circumstances, the school administrator will conduct searches in the presence of another adult. Any object or substance found which may be evidence of a crime will be given to the police. Objects or substances which may be evidence of a school rule violation, but not a crime, will be held by Chelmsford Public Schools administrators, and, if appropriate, may be returned to the student's parents.

Because the Chelmsford Public Schools has the right to inspect school property at its discretion, the Principal may permit law enforcement to search school property, including with the use of drug detection dogs. Individuals shall not be subjected to a search by a drug detection dog.

#### **Locker Rooms**

Students are not to enter a locker room that is not supervised by an adult, unless they have permission from a coach or staff member. While in the locker rooms, students are expected to follow all of the school rules and expectations, including the prohibitions against bullying and hazing.

#### ***Academic Integrity***

Academic Integrity is Chelmsford Public Schools' commitment to responsibility, honesty, trust, and respect. Academic Integrity essentially means being responsible for one's own work, and it is held in high regard in our schools. Students can take pride in work they have produced from their own efforts; they have worked honestly and fairly.

Academic Integrity also means upholding values and beliefs that are considered important, not just by our schools, but also by society, including sports teams, employers, friends and family. Violating our policy on Academic Integrity is cheating and a violation of school rules. For more specific Middle School Information on the Academic Honor Code, please visit the McCarthy or Parker School Website. For more specific High School Information on the Academic Honor Code, please see the High School Handbook Addendum.

**What are some examples of cheating?**

- Sharing questions from an exam with another student who has not yet taken the exam
- Copying another student's answers on a homework assignment
- Copying some other student's work and claiming it as your own
- Allowing another student to copy your work or giving your work to them to turn in as their own
- Forging (signing) your parent's/guardian's name on a note or permission slip
- Plagiarism (copying another's words/work without giving credit), including copying material or ideas from books, internet sources, AI, etc.
- Changing grades on midterm or report card
- Use of electronic devices for unauthorized sharing of information.
- The unauthorized use of Artificial Intelligence (AI), which may include but not be limited to using AI to gain an unfair advantage, such as using AI-enabled math-solving websites to solve math problems or employing generative AI to create art or graphics for assignments as well as writing essays or papers.

#### **Why is cheating wrong?**

- It breaks a bond of trust — we become suspicious of others.
- It is against the rules and there are serious penalties. People have been thrown out of college, lost jobs, and ruined their careers over cheating.

#### **What is Plagiarism?**

Plagiarism is a form of cheating. Alexander Lindey has defined plagiarism as: "...the wrongful act of taking the product of another person's mind and presenting it as one's own...To use another person's ideas or expressions in your writing without acknowledging the source is to plagiarize. Plagiarism, then, constitutes intellectual theft." (Lindey, Alexander. Plagiarism and Originality)

The following are examples of plagiarism:

1. Buying or downloading a paper from a research service or a term-paper mill and offering it as your own.
2. Turning in another student's work, with or without that student's knowledge, as your own.
3. Copying any portion of another's work without proper acknowledgement.
4. Paraphrasing ideas and language from a source without proper documentation.
5. Using Artificial Intelligence (AI) to generate essays or papers and turning them in as one's own work without proper attribution is considered plagiarism.

#### **Consequences for Cheating or Plagiarism**

allowed the opportunity for make-up of any kind.

2. A conference may be held with the student, teacher, and the student's Dean.
3. Parents/guardians will be notified of the offense.
4. Students will be required to attend an after-school session on cheating and plagiarism.

**Exception:** The definition of plagiarism given above includes "Paraphrasing ideas and language from a source without proper documentation" (definition number 4). In violations that pertain to this type of plagiarism, the teacher, in consultation with the student's administrator, will determine the consequences. The purpose of the consequence in this case will be to teach the proper way to attribute sources in academic work. The teacher will use his or her professional expertise to determine whether or not the offense relates to definition number 4.

#### *Directory Information*

(603 CMR 23.07 (4) (a))

A school may release the following directory information: a student's name, address, telephone listing, date and place of birth, major field of study, dates of attendance, weight and height of members of athletic teams, class, participation in officially recognized activities and sports, degrees, honors and awards, and post-high school plans without the consent of the eligible student or parent; provided that the school gives public notice of the types of information it may release under 603 CMR 23.07 and allows eligible students and parents a reasonable time after such notice to request that this information not be released without the prior consent of the eligible student or parent.

#### *Incident Management*

The Chelmsford Public School District has a comprehensive Incident Management Plan. It is expected that all students participate in the prescribed emergency drills in their schools as instructed by the school administration and staff. It is imperative that students understand the importance of engaging in these procedures in a serious manner so as to be fully prepared should an emergency arise during the school day.

There are four types of drills that are required for all staff and students in all school buildings during the school year:

**Evacuation Drill** – is used when it is important to move away from the building to a secure location away from the building. This drill will take place at least four (4) times per year under the direction of the Chelmsford Fire Department.

**Safety Drill** – is used when a bomb-type threat is made to the safety of a building. These drills will take place at least two times per year.

place in the hallway. A hold in place implies that instruction should continue within the classroom, and that students should remain in the classroom until further notice. These drills will take place at least two times per year.

#### ***ALICE/Option-Based Response – ALICE/Options Based Response***

The ALICE/Options Based Emergency Response(s) require staff and students to make survival decisions based on real-time information. Each one of these emergency situations is unique and likely requires a different response. ALICE is an acronym for the 5 steps you can utilize in order to increase your chances of surviving a surprise attack by an Active Shooter. It is important to remember that the ALICE response does not follow a set of sequential actions you must follow when confronted with an Active Shooter. Decisions are made using the information available at any given time. Your survival is paramount, and it is critical that staff and students are prepared to react if they are ever faced with one of these situations.

*1) **ALERT** – Use any available means of communication to tell others what is happening.*

*2) **LOCKDOWN/ENHANCED LOCKDOWN**– This is a semi-secure starting point from which to make survival decisions. If you decide to not evacuate, secure the room.*

*3) **INFORM** – Using any means necessary to pass on real time information.*

*4) **COUNTER** – This is the use of simple, proactive techniques should you be confronted by the Active Shooter.*

*5) **EVACUATE** – Remove yourself from the danger zone as quickly as possible.*

The District has a crisis response team to oversee the safety and security of students and staff and the implementation of the District's emergency policies during crisis incidents. The District's crisis response team is led by the building principal.

#### ***Delayed Openings and School Cancellations***

In cases of inclement weather or other emergency necessitating the closing or delaying of school, the Superintendent will make the decision. Central administration personnel will then notify the radio and television stations between 5:00 AM and 5:45 AM. A Blackboard Connect-Ed message will be sent to all families and staff. Delayed Openings will be posted on the district and school websites.

the same dismissal time. Morning Kindergarten and CHIPS Preschool classes will be cancelled when the start of school is delayed. Please see the school website for a complete listing of school start and dismissal times.

### *Emergency Closings*

On a rare occasion school may be closed due to a weather-related event. In this case, all children must be sent home, with the exception of those children scheduled to attend the Community Education Extended Day Child Care program. Elementary children enrolled in the Extended Day Child Care program will remain at their school and parents will pick them up as soon as possible, but no later than 6 p.m. McCarthy Childcare students will be bussed as usual to Parker, and parents should pick up Parker and McCarthy students at Parker as soon as possible, but no later than 6 p.m.

1. The Superintendent will notify the school that busses would be arriving to take children home at a specified time.
2. A Connect-Ed call would be used to notify parents of dismissal procedures.

**It is important that parents keep their home, business, and emergency numbers current with the school as these are the numbers which will be called through Connect-Ed.**

Parents who plan to come to the school to pick up their child are strongly encouraged NOT to call the school and tie up the phone lines. Just come to the office and your child will be dismissed. It is imperative that each child knows where to go in the event that a parent cannot be notified. For parent peace of mind, this would also help in those rare cases when an emergency arises, and a parent cannot get home to meet their child.

### *Hazing*

Hazing is prohibited and is a crime. Any student who violates the anti-hazing laws (M. G. L. c. 269, §§ 17-19) may be subject to discipline, including possible suspension. The following is a copy of M. G. L. c. 269, §§ 17-19.

Section 17. Whoever is a principal organizer or participant in the crime of hazing, as defined herein, shall be punished by a fine of not more than three thousand dollars or by imprisonment in a house of correction for not more than one year, or both such fine and imprisonment.

The term "hazing" as used in this section and in sections eighteen and nineteen, shall mean any conduct or method of initiation into any student organization, whether on public or private property, which willfully or recklessly endangers the physical or mental health of any student or other person. Such conduct shall include whipping, beating, branding, forced calisthenics, exposure to the weather, forced consumption of any food, liquor, beverage, drug or other substance, or any other brutal treatment or forced physical activity which is likely to adversely affect the physical health or safety of any such



including extended deprivation of sleep or rest or extended isolation.

Notwithstanding any other provisions of this section to the contrary, consent shall not be available as a defense to any prosecution under this action.

Section 18. Whoever knows that another person is the victim of hazing as defined in section seventeen and is at the scene of such crime shall, to the extent that such person can do so without danger or peril to himself or others, report such crime to an appropriate law enforcement official as soon as reasonably practicable. Whoever fails to report such crime shall be punished by a fine of not more than one thousand (\$1,000) dollars.

Section 19. Each institution of secondary education and each public and private institution of post-secondary education shall issue to every student group, student team or student organization which is part of such institution or is recognized by the institution or permitted by the institution to use its name or facilities or is known by the institution to exist as an unaffiliated student group, student team or student organization, a copy of this section and sections seventeen and eighteen; provided, however, that an institution's compliance with this section's requirements that an institution issue copies of this section and sections seventeen and eighteen to unaffiliated student groups, teams or organizations shall not constitute evidence of the institution's recognition or endorsement of said unaffiliated student groups, teams or organizations.

Each such group, team or organization shall distribute a copy of this section and sections seventeen and eighteen to each of its members, plebes, pledges or applicants for membership. It shall be the duty of each such group, team or organization, acting through its designated officer, to deliver annually, to the institution an attested acknowledgement stating that such group, team or organization has received a copy of this section and said sections seventeen and eighteen, that each of its members, plebes, pledges, or applicants has received a copy of sections seventeen and eighteen, and that such group, team or organization understands and agrees to comply with the provisions of this section and sections seventeen and eighteen.

Each institution of secondary education and each public or private institution of post-secondary education shall, at least annually, before or at the start of enrollment, deliver to each person who enrolls as a full-time student in such institution a copy of this section and sections seventeen and eighteen.

Each institution of secondary education and each public or private institution of post-secondary education shall file, at least annually, a report with the board of higher education and in the case of secondary institutions, the board of education, certifying that such institution has complied with its responsibility to inform student groups, teams or organizations and to notify each full time student enrolled by it of the provisions of this section and sections seventeen and eighteen and also certifying that said institution has adopted a disciplinary policy with regard to the organizers and participants of hazing, and that such policy has been set forth with appropriate emphasis in the student handbook or similar means of communicating the institution's policies to its students. The board of higher education and, in the case of secondary institutions, the board of education shall promulgate regulations governing the content and frequency of such reports and shall forthwith report to the attorney general any such institution which fails to make such report.

#### *McKinney-Vento*

According to the Federal McKinney-Vento Homeless Education Assistance Act, schools are required to immediately enroll homeless students in school, even if they do not have the documents usually required for enrollment, such as school records, medical records, or proof of residency. There are similar protections under Title I of Every Student Succeeds Act (ESSA) for foster care students. For additional information regarding the education of homeless students, please contact the homeless liaison coordinator. For information regarding foster care students, please contact the DCF liaison of the Chelmsford Public Schools.

The Chelmsford Public Schools prohibits discrimination or harassment based on homelessness. Any complaints of discrimination or harassment based on homelessness may be reported to the homeless liaison coordinator and will be investigated using the same process and steps as the Chelmsford Public Schools' non-discrimination procedures.

#### *Prevention of Physical Restraint and Requirements If Used*

The Chelmsford Public Schools recognizes that on occasion physical restraint is required to protect the safety of school community members from assault, or serious, imminent physical harm. Physical restraint may be used only as an emergency procedure of last resort and shall be prohibited in public education programs except when a student's behavior poses a threat of assault, or imminent, serious, physical harm to self or others and the student is not responsive to directives or other lawful and less intrusive behavior interventions, or such interventions are deemed inappropriate under the circumstances. Physical restraint shall mean direct physical contact that prevents or significantly restricts a student's freedom of movement. Physical restraint does not include: brief physical contact to promote student safety, providing physical guidance or prompting when teaching a skill, redirecting attention, providing comfort, or a physical escort.

Physical restraint shall not be used: (a) as a means of discipline or punishment; (b) when the student cannot be safely restrained because it is medically contraindicated for reasons including, but not limited to, asthma, seizures, a cardiac condition, obesity, bronchitis, communication-related disabilities, or risk of vomiting; (c) as a response to property destruction, disruption of school order, a student's refusal to comply with a public education program rule or staff directive, or verbal threats when those actions do not constitute a threat of assault, or imminent, serious, physical harm; or (d) as a standard response for any individual student. No written individual behavior plan or individualized education program (IEP) may include use of physical restraint as a standard response to any behavior. Physical restraint is an emergency procedure of last resort. Physical restraint in a public education program shall be limited to the use of force necessary to protect a student or another from physical injury or harm.

Nothing in Chelmsford Public Schools policy, or the applicable regulations, prohibits: (a) the right of any individual to report to appropriate authorities a crime committed by a student or other individual; (b) law enforcement, judicial authorities or school security personnel from exercising their responsibilities, including the physical detainment of a student or other person alleged to have

mandated reporter pursuant to MGL c. 119, § 51A.

The Chelmsford Public Schools complies with the requirements of Massachusetts regulations governing the use and reporting of physical restraint in school, 603 CMR 46.00.

### *Child Abuse/51A Mandatory Reporting*

All school staff are mandated reporters. By law, information about child abuse and neglect must be communicated by school employees to the Massachusetts Department of Children & Families (DCF) according to DCF protocol, and/or to the Principal (or their designee), who in turn are responsible for notifying DCF according to DCF protocol. The duty to report is triggered when a mandated reporter, in their professional capacity, has reasonable cause to believe that a child is: (i) suffering physical or emotional injury resulting from abuse inflicted upon them which causes harm or substantial risk of harm to the child's health or welfare including, but not limited to, sexual abuse; (ii) suffering physical or emotional injury resulting from neglect including, but not limited to, malnutrition; (iii) a sexually exploited child; or (iv) a human trafficking victim, as defined by section 20M of chapter 233; provided, however, that an indication of prenatal substance exposure shall not solely meet the requirements of this section.

In schools, mandated reporters must fulfill their mandatory reporting duty by:

1. immediately making an oral report directly to DCF and then following up with a written report (which can be filed online, by fax, or mail) to the DCF local area office within 48 hours; **or**
2. immediately notifying the Principal (or their designee), in which case that individual becomes responsible for immediately making the oral report to DCF and submitting the written report (which can be filed online, by fax, or mail) to the DCF local area office within 48 hours.

A mandated reporter who works for a school *may* also choose to immediately notify both DCF and the person in charge of the school. In addition, mandated reporters may contact the police or the Office of the Child Advocate.

If a mandated reporter believes a child is in imminent danger, they should call 911 immediately. If school officials believe that criminal laws may have been violated, whether or not the violation is included under § 51A, they should report such matter to the police.

Any person, even if not a mandated reporter, may file a report with DCF if that person has reasonable cause to believe that a child is suffering from, or has died as a result of, abuse or neglect.

Any suspected abuse or neglect of a person with a disability aged 18 and over must be reported to the Disabled Persons Protection Commission (DPPC), 300 Granite Street, Braintree, MA, 02184. Tel: (617) 727-6455.

staff of the reporting requirements for child abuse and neglect under M. G. L. c. 119, § 51A. See M. G. L. c. 71, § 37L. The District is knowledgeable about this protocol and will ensure that staff are informed of their reporting obligations under M. G. L. c. 119, § 51A. All staff are made aware of the signs of child abuse and neglect, and the Principal, on a yearly basis, informs all professional staff of their obligations to report cases of child abuse and neglect.

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# CHELMSFORD PUBLIC SCHOOLS

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## **Memorandum**

To: Jay Lang, Ed.D., Superintendent of Schools  
Members of the School Committee

From: Joanna Johnson-Collins, Director of Business & Finance

Date: December 29, 2025

Re: 2026/27 Kindergarten Registration

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Kindergarten Registration for the 2026/27 school year will begin January 27, 2026 and January 28, 2026 at the Central Administration Offices from 9:00 a.m. to 6:00 p.m. Parents and guardians are currently making appointments (in approximately fifteen-minute increments) for their registration meeting. This information is posted on the Chelmsford Public School website and is announced through other outlets (i.e. ConnectEd and social media). Attached are the flyers announcing Kindergarten registration as posted on the CPS website.



## 2026-27 Kindergarten Registration Open

*Kindergarten registration for the 2026-27 academic year must be made by appointment.*

**[RESERVE YOUR APPOINTMENT HERE](#)**

### **WHEN:**

- Tuesday, Jan. 27, 2026 from 9:00 a.m.-6:00 p.m.
- Wednesday, Jan. 28, 2026 from 9:00 a.m.-6:00 p.m.

### **WHERE:**

- Chelmsford Public Schools Central Administration Office, 230 North Road, Chelmsford, MA.

### **STIPULATIONS:**

- Children entering kindergarten must be 5 years of age on or before August 31, 2026.
- Parents/guardians must complete the Google form with contact information and preferred appointment time (appointments take approximately 15 minutes).
- A staff member will follow-up with each parent to confirm date and time of appointment.

### **WHEN YOU ARRIVE TO REGISTRATION:**

A staff member will direct parents to a table representing each elementary school to process their student registration packet. In addition to the completed student registration packet, parents are required to submit the following required documentation:

1. A parent driver's license
2. Proof of residency/home ownership:
  - A copy of your mortgage statement or
  - Recently signed P&S Agreement, which requires follow-up with a home closing document or
  - Signed lease agreement or
  - Notarized Affidavit Supporting Residence document with the homeowner's real estate tax bill and copy of homeowner's driver's license.
3. Utility bill with name and address



4. A copy of the child's birth certificate
5. Certificate of lead poisoning and vision exam with stereopsis documentation
6. A physical examination within one year of entrance to school or within 30 days after school entry and updated immunizations covering the following:
  - diphtheria (5 doses)
  - pertussis (5 doses)
  - tetanus (5 doses; Td booster grade 7)
  - mumps-rubella-measles (2 doses)
  - polio (4 doses)
  - varicella (2 doses or Dr. documentation of chicken pox)
  - Hepatitis B (3 doses)
7. A copy of a current immunization record is required for registration.

If additional immunizations are needed prior to the beginning of school, a copy of the complete immunization record which meets state requirements must be provided prior to school entrance.

### **IF YOU ARE UNABLE TO SCHEDULE AN APPOINTMENT:**

Families who are not able to schedule an appointment for one of these two dates may complete the registration packet from the website and drop it off at the school administration central office located at 230 North Road, Chelmsford, MA 01824. Office hours are Monday through Friday between 8 a.m.-4 p.m.

Additional information about student registrations and packets may be found on the CPS website registration page.

### **ALL DOCUMENTATION IS REQUIRED AT THE TIME OF REGISTRATION**

#### **Contact:**

Ms. Jane McDonald  
Central Registrar  
Phone: 978-251-5100, ext. 6901  
mcdonaldj@chelmsford.k12.ma.us

**From:** [CPS Superintendent](#)  
**To:** [Lang, Jay](#)  
**Subject:** CPS Bullying Prevention and Intervention Plan - Updated  
**Date:** Friday, January 2, 2026 4:01:30 PM

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A message from CHELMSFORD PUBLIC SCHOOL DISTRICT

CPS Parents and Guardians,

Every two years, each school district in the Commonwealth of Massachusetts must update its plan to address bullying prevention and intervention in accordance with state law. A link to the updated Chelmsford Public Schools Bullying Prevention and Intervention Plan may be found below. The Plan applies to students and members of school staff, including, but not limited to, educators, administrators, school nurses, cafeteria workers, custodians, bus drivers, athletic coaches, advisors to an extracurricular activity, and paraprofessionals. A public comment period on the updated CPS Bullying Prevention and Intervention Plan is posted on the January 6, 2026 regular school committee meeting agenda.

Sincerely,

Jay Lang, Ed.D.

Superintendent of Schools

CPS Bullying Prevention and Intervention Plan Link:

<https://drive.google.com/file/d/1UxbBClpIMlsNpI1s868sLwWPVdbb74hl/view?usp=sharing>

# **CHELMSFORD PUBLIC SCHOOLS BULLYING PREVENTION AND INTERVENTION PLAN**



**Revised Winter 2026**

**Chelmsford Public Schools  
230 North Road  
Chelmsford, MA 01824**

Revised and Updated

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## **APPENDIX**

- A: Bullying Prevention and Intervention Incident Reporting Form**
- B. In Class Curriculum and Instruction Relative to Bullying**
- C: In School Curriculum and Instruction Relative to Bullying**

## **I. Introduction**

The Bullying Prevention and Intervention Plan (“Plan”) is a comprehensive approach to addressing bullying, cyberbullying, and retaliation. The Plan applies to all students and all school staff members, including, but not limited to, educators, administrators, school nurses, cafeteria workers, custodians, bus drivers, athletic coaches, advisors to an extracurricular activity, and paraprofessionals. The Principal in each building, or their designee, is responsible for the implementation and oversight of the Plan.

## **II. Definitions**

The following definitions are provided by M. G. L. c. 71, § 37O and its implementing regulation at 603 C.M.R. 49.02:

Aggressor: perpetrator of bullying or retaliation as defined in M.G.L. c. 71, §37O.

Bullying: is the repeated use by one or more students or by a member of a school staff including, but not limited to, an educator, administrator, school nurse, cafeteria worker, custodian, bus driver, athletic coach, advisor to an extracurricular activity or paraprofessional of a written, verbal, or electronic expression or a physical act or gesture or any combination thereof, directed at a victim that:

- i. causes physical or emotional harm to the victim or damage to the victim’s property;
- ii. places the victim in reasonable fear of harm to themselves or of damage to their property;
- iii. creates a hostile environment at school for the victim;
- iv. infringes on the rights of the victim at school; or
- v. materially and substantially disrupts the education process or the orderly operation of a school.

Cyberbullying: is bullying through the use of technology or any electronic communication, which includes, but is not limited to, any transfer of signs, signals, writing, images, sounds, data or intelligence of any nature transmitted in whole or in part by a wire, radio, electromagnetic, photo electronic or photo optical system, including, but not limited to, electronic mail, internet communications or postings, instant messages or facsimile communications. Cyber-bullying shall also include (i) the creation of a web page or blog in which the creator assumes the identity of another person or (ii) the knowing impersonation of another person as the author of posted content or messages, if the creation or impersonation creates any of the conditions enumerated in clauses (i) to (v), inclusive, of the definition of bullying. Cyber-bullying shall also include the distribution by electronic means of communication to more than one person or the posting of material on an electronic medium that may be accessed by one or more persons, if the distribution or posting creates any of the conditions enumerated in clauses (i) to (v), inclusive, of the definition of bullying.

Hostile environment: is a situation in which bullying causes the school environment to be permeated with intimidation, ridicule, or insult that is sufficiently severe or pervasive to alter the conditions of a student’s education.

Perpetrator: a student or a member of a school staff including, but not limited to, an educator, administrator, school nurse, cafeteria worker, custodian, bus driver, athletic coach, advisor to an extracurricular activity or paraprofessional who engages in bullying or retaliation.

Principal: The administrative leader of a public school, charter school, collaborative school, or approved private day or residential school, or his or her designee for the purposes of implementing the school's bullying

prevention and intervention plan.

Retaliation: is any form of intimidation, reprisal, or harassment directed against a student who reports bullying, provides information during an investigation of bullying, or witnesses or has reliable information about bullying.

School: an approved private day or residential school, collaborative school, or charter school.

School grounds: includes any property on which a school building or facility is located or property that is owned, leased or used by the Chelmsford Public Schools for a school-sponsored activity, function, program, instruction or training.

Staff: includes, but is not limited to, educators, administrators, counselors, school nurses, cafeteria workers, custodians, bus drivers, athletic coaches, advisors to extracurricular activities, support staff, or paraprofessionals.

Target: is a student against whom bullying, cyberbullying, or retaliation has been perpetrated.

Victim: a student against whom bullying or retaliation has been perpetrated.

### **III. Leadership**

District and school leadership at all levels in the Chelmsford Public Schools will play a critical role in the ongoing development and implementation of the Bullying Prevention and Prevention and Intervention Plan in the context of other whole school and community efforts to promote a positive and safe school climate. Leaders have a primary role in teaching students to be civil to one another and promoting understanding of and respect for diversity and difference. Leadership also has the responsibility for setting priorities and for staying up to date with current research on ways to prevent and effectively respond to bullying. It is also the responsibility of leaders to communicate to the greater school and local community regarding the Plan.

The District will, develop, adhere to, and biennially update the Plan in consultation with teachers, school staff, professional support personnel, volunteers, administrators, community representatives, law enforcement, students, parents, and guardians. Such consultation will include, but not be limited to, notice and a public comment period.

### **IV. Priority Statement**

The Chelmsford Public Schools maintain a respectful environment for all. As such, we are committed to providing all students with a safe learning environment that is free from bullying and retaliation, where all school community members treat one another with respect and appreciate the rich diversity in our schools. This commitment is an integral part of our district's comprehensive efforts to promote learning, eliminate all forms of bullying and other harmful behavior, and enable students to achieve their personal and academic potential and become successful members of our increasingly diverse society.

### **V. Data Collection**

The District will annually report bullying incident data to the Department of Elementary and Secondary Education ("DESE") in the form and manner established by DESE. Reported data will include: the number of reported allegations of bullying or retaliation, the number and nature of substantiated incidents, the number of students disciplined, and any other information required by DESE. The Principal or designee will be responsible for overseeing the collection, maintenance, and reporting of such data. Additionally, at least once every four years, the District will administer the DESE student survey. The Principal or designee will be

responsible for verifying completion of the DESE student survey and will forward completed surveys to the DESE.

## **VI. Prohibition Against Bullying and Retaliation**

Bullying and retaliation are prohibited. For the purpose of this Plan, references to bullying shall include cyber-bullying.

Acts of bullying, which include cyber-bullying, are prohibited:

- (i) On school grounds and property immediately adjacent to school grounds; at a school-sponsored or school-related activity, function or program whether on or off school grounds; at a school bus stop, on a school bus or other vehicle owned, leased or used by a school district or school; or through the use of technology or an electronic device owned, leased or used by a school district or school; and
- (ii) At a location, activity, function or program that is not school-related, or through the use of technology or an electronic device that is not owned, leased or used by a school district or school, if the acts create a hostile environment at school for the target, infringe on their rights at school or materially and substantially disrupt the education process or the orderly operation of a school.

Retaliation against a person who reports bullying, provides information during an investigation of bullying or witnesses or has reliable information about bullying is also prohibited.

Nothing in this Plan requires the district or school to staff any non-school related activities, functions or programs.

We understand that members of certain student groups may be more vulnerable to becoming targets of bullying based on actual or perceived characteristics, including race, color, religion, ancestry, national origin, sex, socioeconomic status, homelessness, academic status, gender identity or expression, physical appearance, pregnant or parenting status, sexual orientation, mental, physical, developmental or sensory disability, or by association with a person who has or is perceived to have one or more of these characteristics. We will take specific steps to create a safe, supportive environment for vulnerable populations in the school community, and provide all students with the skills, knowledge, and strategies to prevent or respond to bullying, harassment, or teasing. See Appendix B and Appendix C (detailing steps taken in and outside of the classroom to address and/or prevent bullying).

## **Training and Professional Development**

Assessing needs and resources. At least once every four years beginning with 2015-16 school year, the district will administer a Department of Elementary and Secondary-developed student survey to assess school climate and the prevalence, nature, and severity of bullying in our schools. Additionally, the school or district will annually report bullying incident data to the Department.

Annual staff training on the Plan. At the building level, annual training for all school staff on the Plan will include staff duties under the Plan, an overview of the steps that the principal or designee will follow upon receipt of a report of bullying or retaliation, and an overview of the bullying prevention curricula to be offered at all grades throughout the school or district. Staff members hired after the start of the school year are required to participate in school-based training during the school year in which they are hired.

Ongoing professional development. The goal of professional development is to establish a common understanding of tools necessary for staff to create a school climate that promotes safety, civil communication, and respect for differences. Professional development will build the skills of staff members to prevent, identify, and



respond to bullying. As required by law, the content of school-wide and district-wide professional development will be informed by research and will include information on:

- Developmentally/age-appropriate strategies to prevent bullying;
- Developmentally/age-appropriate strategies for immediate, effective interventions to stop bullying incidents;
- Information regarding the complex interaction and power differential that can take place between and among an perpetrator, victim, and witnesses to the bullying;
- Research findings on bullying, including information about specific categories of students who have been shown to be particularly at risk for bullying in the school environment;
- Information on the incidence and nature of cyberbullying; and
- Internet safety issues as they relate to cyberbullying.

The District will provide all staff with an annual written notice of the Plan by publishing information about it, including relevant sections for staff, in the District employee handbook. The Plan will also be available on the District's website.

A key aspect of promoting positive and safe school climates is ensuring that the underlying emotional needs of targets, aggressors, families, and others are addressed by the following:

A. Some in-district Chelmsford Public School resources include:

- School Counselors
- School Nurses
- Clinical Psychologists
- Health/PE Department Head
- Peer groups
- Mentoring programs
- After school activities
- Extended Day Programs
- Second Step Liaisons
- Staff study groups

Depending on the case, these individuals can assist schools in developing safety plans for students who have been targets of bullying or retaliation, providing social skills programs to prevent bullying, and offering education and/or intervention services for students exhibiting bullying behaviors.

B. Some out-of-district resources include:

- Clinical health care agencies
- Chelmsford Police Department
- Middlesex District Attorney/Project Alliance
- Group homes
- Department of Children Services
- Private nurseries
- Crisis hotlines
- Live Smart
- Food banks
- Medical facilities
- Counseling agencies

The Chelmsford Public Schools will make referrals to these outside services when appropriate. Referrals will comply with the student records laws and regulations.

C. Students with disabilities: As required by M.G.L. c. 71 B, § 3, as amended by Chapter 92 of the Acts of 2010, when the IEP Team determines that the student has a disability that affects social skills development or the student may participate in or is vulnerable to bullying, harassment, or teasing because of their disability, the Team will consider what should be included in the IEP to develop the student's skills and proficiencies to avoid and respond to bullying, harassment, or teasing.

## **Academic and Non-Academic Activities**

Chelmsford's beliefs are integrated into all academic and non-academic activities.

A. Specific age-appropriate bullying prevention approaches. Bullying prevention curricula will be informed by current research which, among other things, emphasizes the following approaches:

- using scripts and role plays to develop skills;
- empowering students to take action by knowing what to do when they witness other students engaged in acts of bullying or retaliation, including seeking adult assistance;
- helping students understand the dynamics of bullying and cyberbullying, including the underlying power imbalance;
- emphasizing cyber safety, including safe and appropriate use of electronic communication technologies;
- enhancing students' skills for engaging in healthy relationships and respectful communications; and
- engaging students in a safe, supportive school environment that is respectful of diversity and difference.

B. General teaching approaches that support bullying prevention efforts. The following approaches are integral to establishing a safe and supportive school environment. These underscore the importance of our bullying intervention and prevention initiatives:

- setting clear expectations for students and establishing school and classroom routines;
- creating safe school and classroom environments for all students;
- using appropriate and positive responses and reinforcement, even when students require discipline;
- using positive behavioral supports;
- encouraging adults to develop positive relationships with students;
- modeling, teaching, and rewarding pro-social, healthy, and respectful behaviors;
- using positive approaches to behavioral health, including collaborative problem-solving, conflict resolution training, teamwork, and positive behavioral supports that aid in social and emotional development;
- using the Internet safely; and
- supporting students' interest and participation in non-academic and extracurricular activities, particularly in their areas of strength.

**\*\*Please see Appendices A and B for examples of in class and in school curriculum and instruction relative to bullying prevention.**

## **VII. Policies and Procedures for Reporting and Responding to Bullying and Retaliation**

### **A. Reporting bullying or retaliation.**

Reports of bullying or retaliation may be made by staff, students, parents or guardians, or others, to the principal or designee, and may be oral or written. Oral reports made by or to a staff member may be recorded in writing. A

Chelmsford Public Schools' staff member is required to report immediately to the principal or designee any instance of bullying or retaliation the staff member becomes aware of or witnesses. Reports made by students, parents or guardians, or other individuals who are not school or district staff members, may be made anonymously. Any report made anonymously will be thoroughly investigated, however, a student will not be disciplined on the basis of an anonymous report. Staff may use the initial referral form. The requirement to report to the principal or designee does not limit the authority of the staff member to respond to behavioral or disciplinary incidents consistent with school policies and procedures for behavior management and discipline.

Use of an Incident Reporting Form is not required as a condition of making a report (**See Appendix A**). The school or district will:

1. Include a copy of the Incident Reporting Form in the beginning of the year packets for students and parents or guardians;
2. Make it available in the school's main office, the counseling office, the school nurse's office, and other locations determined by the principal or designee; and
3. Post it on the school's website. The Incident Reporting Form will be made available in the most prevalent language(s) of origin of students and parents or guardians.

At the beginning of each school year, the school or district will provide the school community, including but not limited to, educators, administrators, staff, students, and parents or guardians, with written notice of its policies for reporting acts of bullying and retaliation. A description of the reporting procedures and resources, including the name and contact information of the principal or designee and information about the Plan, will be incorporated in student and staff handbooks, on the school or district website, and in information about the Plan that is made available to parents or guardians.

The school or district expects students, parents or guardians, and others who witness or become aware of an instance of bullying or retaliation involving a student to report it to the principal or designee by either submitting the Incident Report Form, orally reporting the instance, or otherwise make the principal or designee aware of the instance. Students, parents or guardians, and others may request assistance from a staff member to complete a written report. Students will be provided with practical, safe, private and age-appropriate ways to report and discuss an incident of bullying with a staff member, or with the principal or designee.

Nothing in this Plan prevents an individual from reporting to the police a crime. Nothing in this Plan prohibits an individual from exercising their responsibilities as a mandated reporter under M. G. L. c. 119, sec. 51A and nothing in this Plan shall be used to deter an individual from reporting neglect or abuse to the appropriate state agency.

## **B. Responding to a report of bullying or retaliation.**

Upon receiving a report of bullying or retaliation, the principal or designee will consider the safety of the students.

### **1. Safety**

Before fully investigating the allegations of bullying or retaliation, the principal or designee will consider take steps and to assess the need to restore a sense of safety to the alleged target and/or to protect the alleged target from possible further incidents. Responses to promote safety may include, but not be limited to, creating a personal safety plan; predetermining seating arrangements for the alleged target and/or the alleged aggressor in the classroom, at lunch, or on the bus; identifying a staff member who will act as a "safe person" for the alleged target; and altering the alleged aggressor's schedule and access to the alleged target. Other steps to promote safety may be taken, as appropriate, if the alleged aggressor is a staff member. The principal or designee will take additional steps to

promote safety during the course of and after the investigation, as necessary. The principal or designee will implement appropriate strategies for protecting from bullying or retaliation a student who has reported bullying or retaliation, a student who has witnessed bullying or retaliation, a student who provides information during an investigation, or a student who has reliable information about a reported act of bullying or retaliation.

## **2. Obligations to Notify Others**

*Notice to Another School or District.* If the reported incident involves students from more than one school district, charter school, non-public school, approved private special education day or residential school, or collaborative school, the principal or designee first informed of the incident will promptly notify by telephone the principal or designee of the other school(s) of the incident so that each school may take appropriate action. All communications will be in accordance with state and federal privacy laws and regulations, and 603 CMR 49.00.

*Notice to Law Enforcement.* Prior to the first day of school, the Superintendent or designee shall communicate with the police chief or designee regarding notices of bullying. If after receiving a report of bullying or retaliation, including after an investigation, if the principal or designee has a reasonable basis to believe that criminal charges may be pursued against the aggressor, the principal will immediately notify the local law enforcement agency. Notice will be compliant with the requirements of 603 CMR 49.00 and locally established agreements with the local law enforcement agency and consistent with DESE regulations, including that a Principal may disclose a determination of bullying or retaliation to law enforcement without consent of a student or their parent if the principal has a reasonable basis to believe that criminal charges may be pursued against the aggressor. . The Principal shall communicate with law enforcement in a manner that protects the privacy of the victim, the aggressor, and any student witnesses to the extent practicable under the circumstances. The Principal is not required to report allegations or determinations of bullying or retaliation to law enforcement if such situations can be handled appropriately within the school. In deciding whether to notify law enforcement, the Principal may consult with the school's resource officer and any other individual deemed appropriate by the Principal. Also, if an incident occurs on school grounds and involves a former student under the age of 21 who is no longer enrolled in school, the principal or designee shall contact the local law enforcement agency if he or she has a reasonable basis to believe that criminal charges may be pursued against the aggressor.

## **C. Investigation.**

Upon receipt of a report or complaint of bullying, clarifying the allegations with the alleged target and determining that the facts as alleged, if true, would meet the statutory definition of bullying or retaliation, the principal or designee will promptly commence an investigation. The principal or designee will maintain confidentiality during the investigation to the extent practicable, and in accordance with state and federal law regarding the privacy of student records and mandated reporting.

During the investigation, the principal or designee will, among other things, interview students, staff, witnesses, parents or guardians, and others as necessary. The principal or designee (or whomever is conducting the investigation) will remind the alleged aggressor, target, and witnesses that retaliation is strictly prohibited and will result in disciplinary action.

Interviews may be conducted by the principal or designee, other staff members as determined by the principal or designee, and in consultation with the school counselor, as appropriate. The principal or designee will maintain a written record of the investigation.

Procedures for investigating reports of bullying and retaliation will be consistent with school or district policies and procedures for investigations. If necessary, the principal or designee will consult with legal counsel about the investigation.

## **D. Determinations.**

The principal or designee will make a determination as to whether the preponderance of the evidence supports a finding that bullying occurred, and if so, what remedial action is required including any necessary responsive and/or disciplinary action. If bullying or retaliation is substantiated, the principal or designee will take reasonable steps to prevent recurrence and to restore a sense of safety to the target.

Depending upon the circumstances, the principal or designee may consult with the students' teacher(s) and/or school counselor, and the target's or aggressor's parents or guardians, to identify any underlying social or emotional issue(s) that may have contributed to the bullying behavior and to assess the level of need for additional social skills development.

### **1. Report of Bullying Substantiated**

#### **a. Notice to Parent/Guardian**

- i. Upon the determination that bullying or retaliation occurred, the principal or designee shall promptly notify the parents or guardians of the victim and the perpetrator. Notice shall be in the primary language of the home. Notice shall include the following information: determination and actions taken to prevent further acts of bullying or retaliation.
- ii. If the bullying is substantiated, notice for the victim's parents/guardians shall include the following information about the Department of Elementary and Secondary Education Program's (DESE's) Problem Resolution System and the process for seeking assistance or filing a PRS claim: *Any parent/guardian wishing to file a claim/concern or seeking assistance outside of the district may do so with the Department of Elementary and Secondary Education Program Resolution System (PRS). That information can be found at: <http://www.doe.mass.edu/prs>, emails can be sent to [compliance@doe.mass.edu](mailto:compliance@doe.mass.edu) or individuals can call 781-338-3700.*
- iii. Notices to parents/guardians will comply with federal and state law regarding the confidentiality of student records, and other privacy laws and regulations. To this end, the principal or designee cannot inform the target's parents/guardians about any disciplinary action taken against the aggressor, unless the information is directly related to the victim (e.g., stay away or no contact order).

#### **b. Response**

- i. Upon the principal or designee determining that bullying or retaliation has occurred, the school will use a range of responses that balance the need for accountability with the need to teach appropriate behavior. The Principal or designee will consider what adjustments, if any, are needed in the school environment to enhance the victim's sense of safety and that of others as well. One strategy that the Principal or designee may use is to increase adult supervision at transition times and in locations where bullying is known to have occurred or is likely to occur.
- ii. Skill-building strategies, and other individualized interventions that the principal or designee may consider to remediate or prevent further bullying and retaliation may include:
  - Offering individualized skill-building sessions based on the Chelmsford Public Schools anti-bullying curricula;
  - Providing relevant educational activities for individual students or groups of students, in consultation with school counselors, school social workers/adjustment counselors, or school psychologist, and other appropriate school personnel;

- Implementing a range of academic and nonacademic positive behavioral supports to help students understand pro-social ways to achieve their goals;
  - Meeting with parents and guardians to engage parental support and to reinforce the anti-bullying curricula and social skills building activities at home;
  - Adopting behavioral plans to include a focus on developing specific social skills;
  - Making a referral for to an appropriate related service provider; and/or
  - Providing counseling or referral to appropriate services for aggressors and targets, and for appropriate family members of said students, regardless of their status under the law.
- iii. Taking Disciplinary Action
- If the principal or designee decides that disciplinary action is appropriate, the disciplinary action will be determined based on the facts and findings of the investigation, including the nature of the conduct, the age of the student(s) involved, and the need to balance accountability with the teaching of appropriate behavior. Discipline will be consistent with the Plan and the District's code of conduct.
  - Discipline procedures for students with disabilities are governed by the federal Individuals with Disabilities Education Act (IDEA), which should be read in conjunction with state laws regarding student discipline.
  - Discipline procedures for staff members will be referred to the Human Resources Department consistent with applicable policies and procedures.

## **2. Report of Bullying Unsubstantiated**

- a. If the principal or designee determines that a student knowingly made a false allegation of bullying or retaliation, that student shall be subject to disciplinary action.
- b. Promoting Safety: The principal or designee will still consider what adjustments, if any, are needed in the school environment to enhance the alleged target's sense of safety and that of others as well.

**\*\*Please see Appendix C for school level rubrics for responses to bullying. The rubrics are based on the work of Stan Davis, author of Schools Where Everyone Belongs.**

## **VIII. Collaboration with Families**

- 1. Parent education and resources.** The school or district will offer education programs for parents and guardians that are focused on the parental components of the anti-bullying curricula and any social competency curricula used by the district or school. The programs will be offered in collaboration with the PTOs, School Councils, Special Education Parent Advisory Council, or similar organizations.
- 2. Notification requirements.** Each year the school or district will inform parents or guardians of enrolled students about the anti-bullying curricula that are being used. This notice will include information about the dynamics of bullying, including cyberbullying and online safety. The school or district will send parents written notice each year about the student-related sections of the Plan and the school's or district's Internet safety policy. All notices and information made available to parents or guardians will be in hard copy and electronic formats and will be available in the language(s) most prevalent among parents or guardians. The school or district will post the Plan and related information on its website.

## **IX. Relationship to Other Laws**

Consistent with state and federal laws, and the policies of the Chelmsford Public Schools, does not discriminate or harass, or tolerate discrimination against or harassment of, students, parents, employees, or the general public on the basis of race, color, religion, ancestry, national origin, sex, socioeconomic status, homelessness, age, immigration status, ethnic background, ancestry, academic status, pregnancy or parenting status, genetic information, gender identity or expression, physical appearance, sexual orientation, or disability, or by any category protected by state or federal law, or by association with a person who has or is perceived to have one or more of these characteristics. Nothing in the Plan prevents characteristics. Nothing in the Plan prevents the District from taking action to remediate discrimination or harassment based on a person's membership in a legally protected category under local, state, or federal law, or school or district policies. If the alleged conduct is on the basis of a protected class (i.e., race, gender, disability, etc.) e, the alleged conduct should be addressed in a manner consistent with the District's Discrimination and Harassment Grievance Procedures.

In addition, nothing in the Bullying Prevention and Intervention Plan is designed or intended to limit the authority of the District to take disciplinary action or other action under M.G.L. c. 71, §§ 37H, 37H½, or 37H¾, or other applicable laws, or school or District policies.



## Appendix A

### CHELMSFORD PUBLIC SCHOOLS BULLYING PREVENTION AND INTERVENTION INCIDENT REPORTING FORM

1. Name of Reporter/Person Filing the Report: \_\_\_\_\_  
(Note: Reports may be made anonymously, but no disciplinary action will be taken against an alleged aggressor solely on the basis of an anonymous report.)
2. Check whether you are the: ☐ Target of the behavior ☐ Reporter (not the target)
3. Check whether you are a: ☐ Student ☐ Staff member (specify role) \_\_\_\_\_  
☐ Parent ☐ Administrator ☐ Other (specify) \_\_\_\_\_
- Your contact information/telephone number: \_\_\_\_\_
4. If student, state your school: \_\_\_\_\_ Grade: \_\_\_\_\_
5. If staff member, state your school or work site: \_\_\_\_\_
- 

6. Information about the Incident:

Name of Target (of behavior): \_\_\_\_\_

Name of Aggressor (Person who engaged in the behavior): \_\_\_\_\_

Date(s) of Incident(s): \_\_\_\_\_

Time When Incident(s) Occurred: \_\_\_\_\_

Location of Incident(s) (Be as specific as possible): \_\_\_\_\_

---

7. Bystanders: (List people who saw the incident or have information about it):

Name: \_\_\_\_\_ ☐ Student ☐ Staff ☐ Other \_\_\_\_\_

Name: \_\_\_\_\_ ☐ Student ☐ Staff ☐ Other \_\_\_\_\_

Name: \_\_\_\_\_ ☐ Student ☐ Staff ☐ Other \_\_\_\_\_

---

8. Describe the details of the incident (including names of people involved, what occurred, and what each person did and said, including specific words used). Please use additional space on back if necessary.

9. Signature of Person Filing this Report: \_\_\_\_\_ Date: \_\_\_\_\_  
(Note: Reports may be filed anonymously.)

10. Form Given to: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date Received: \_\_\_\_\_

## Appendix B

**In Class Curriculum and Instruction Relative to Bullying** - Below is an account of what is or has been done in classrooms to address bullying in our district

### Classroom Instruction

| Grade  | Description of Curriculum/Instruction                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PreK-1 | <b>Second Step-</b> Researched–Based program that feels like play but builds critical social and school-readiness skills that can help young children achieve more skills regarding how to get along with others. Guidance Counselor are in every elementary to support Second Step. Guidance Counselors support classroom teachers with trainings and make connection with literature. <i>*Empathy and Kindness and Problem-Solving CASEL Core Competency Skills: Self-Awareness, Self-Management, Social-Awareness, Relationships Skills, and Responsible Decision Making.</i>                                                                                                                                                                                                                                                                                                                                |
| 1-5    | <b>Second Step-</b> Researched -Based program for students in Grades 1–5 to help students develop strong bonds to school, solve problems without anger, and treat others with compassion. These social skills support academics and form the foundation for happy, healthy kids who succeed. Guidance Counselors are in every elementary school to support Second Step. Guidance Counselors support classroom teachers with trainings and make connection with literature. <i>*Empathy and Kindness and Problem-Solving CASEL Core Competency Skills: Self-Awareness, Self-Management, Social-Awareness, Relationships Skills, and Responsible Decision Making.</i>                                                                                                                                                                                                                                             |
| 6-8    | <b>Second Step-</b> Researched–Based program for students in Grades 6-8 to help students learn the protective skills to make good choices and stay engaged in school despite the pitfalls of substance abuse, bullying, cyber bullying, and peer pressure. <i>*Recognizing and Bullying and Harassment and Managing Relationships and Social Conflicts CASEL Core Competency Skills: Self-Awareness, Self-Management, Social-Awareness, Relationships Skills, and Responsible Decision Making.</i>                                                                                                                                                                                                                                                                                                                                                                                                              |
| 9-12   | <b>Character Strong-</b> Research-Based program for students in Grades 9-12 to help students with a social and emotional learning curricula and professional learning services focused on fostering the whole student with vertically aligned lessons that teach SEL and character, side-by-side. <i>*Practicing Perspective-Taking, Understanding Social Supports, Practicing Social Supports, Strengthening Empathy with Perspective-Taking (Grade 9), Understanding Mental Health, Understanding Well-Being (Grade 10), Hearing Others’ Stories, Assessing Individual and School Barriers to Belonging, Addressing Barriers to Belonging (Grade 11), Understanding Effective Empathy, Expanding Our Circle of Empathy, Practicing Perspective-Taking (Grade 12). CASEL Core Competency Skills: Self-Awareness, Self-Management, Social-Awareness, Relationships Skills, and Responsible Decision Making.</i> |
| 7      | <b>The 7<sup>th</sup> grade Health Curriculum</b> continues with the Second Step philosophy which enables students to learn about and discuss the different forms of harassment and how to make positive decisions regarding conflict. We also have a comprehensive program for internet safety and cyber bullying. That program is the research-based program NetSmartz. This program helps the students to see how dangerous and hurtful putting information on the internet can be. They also learn the proper channels to take to report such bullying.                                                                                                                                                                                                                                                                                                                                                     |
| 8      | <b>The 8<sup>th</sup> grade Health Curriculum</b> deals with the different types of relationships that students engage in. They learn the warning signs of destructive behaviors (bullying, dating violence, etc.) and how to resolve these conflicts through the proper channels                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 9      | <b>HEALTH CLASSES: LIFE MANAGEMENT SKILLS</b> is a required course for Chelmsford High School freshman. The course is outlined by themes implementing the three areas of the health triangle which incorporates building personal physical wellness, mental wellness and social wellness. This course uses the “Bullying Continuum” four-day lesson plan to build knowledge of the definitions of bullying,                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

|       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|       | aggressor, bystander etc., the initial impact on the victim, and the link between the long-term impact, self-medication, depression and suicide. Students are given the opportunity to express their thoughts and ideas through writing, open discussion and teamwork. The entire Life Management Skills curriculum reinforces the objectives of these lessons throughout the semester by empowering students with the tools necessary to personally LIVE SMART physically, mentally and socially.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 10-12 | <p><b>HEALTH CLASSES:</b> During these years, the students are offered a variety of electives that support the current Mass State Frameworks. These classes also support the issues that teens are facing today especially bullying and how to handle themselves and help others during these times. The courses that are offered are <b>Reality Check</b> and <b>The Power of Choice Check</b>.</p> <p><b>Reality Check</b> is an elective for junior and senior students at Chelmsford High School. The course is outlined by themes implementing the three areas of the health triangle which incorporates building personal physical wellness, mental wellness, and social wellness. This course uses the “Words that Hurt” two-day lesson plan to define bully, aggressor, bystander etc. It was updated to fit the current state and district guidelines. Students openly identify prevalent use of hurtful words and phrases used at Chelmsford High School, through text messaging and social networking sites. They use a discussion protocol to listen as others share the impact they have witnessed, heard of and personally felt. Students work together to create personal challenges and challenges within their peer group to break down the communication barriers to allow for reflection of the serious impact such behavior can have on the individuals, groups of students, and the school community as a whole. The entire Reality Check curriculum reinforces the objectives of these lessons throughout the semester by empowering students with the tools necessary to personally LIVE SMART physically, mentally, and socially.</p> |
| 9     | <b>FRESHMAN LITERATURE:</b> Throughout the ninth-grade year, the English department uses its curriculum as a lens for students to understand themselves and their role in the world. A major focus of this role is their interactions with those around them. Naturally, this is a great way to incorporate bullying prevention by scaffolding the concepts that contribute to bullying and exploring them through literature and then connecting them to the students’ lives. Attached is a very brief overview of what is taught in 9 <sup>th</sup> grade literature.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 10-12 | <b>SOCIOLOGY &amp; PSYCHOLOGY:</b> During these classes, students learn and discuss the internal and external factors as to why people are aggressors. Also, during this class, they are taught about the different social interactions and how they can know the differences between them. Throughout this course curriculum the students learn to deal with the social stigmas attached to these factors and interactions. Attached is a very brief overview of what is taught during this class                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 9-10  | <b>MEDIA and LITERACY:</b> Exploring how media and communication tools shape our relationship to society, each other, and ourselves...what that means for 21st century learners and activists...and what we can do about it. As a part of our study of media literacy, students are exposed to the positive and negative aspects of the World Wide Web and social media. Students will learn the constructive intent of these media, as well as how to deconstruct them for thorough knowledge. One additional goal will be to instruct students on creating positive digital footprints.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

*\*Denotes specific lessons dedicated to creating a safe, supportive environment for vulnerable populations in the school community and to provide all students with the skills, knowledge and strategies needed to prevent or respond to bullying or harassment.*

## Appendix C

**In School Curriculum and Instruction Relative to Bullying** - Below is an account of what has been done outside of the classroom to address bullying (e.g., assemblies, study groups, speakers, workshops, etc.)

| Grade  | Brief Description of Activity                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| K-4    | Full time Guidance Counselor in every elementary school to support Second Step. Guidance Counselors support classroom teachers with trainings, make connections with literature and teach classroom and small group guidance lessons utilizing the Super flex curriculum. Grade level meetings and assemblies address bullying; reinforce Second Step principles and positive social interaction skills. Other activities include bulletin board displays promoting pro-social values, school improvement goals that relate to emotional and social well-being, study groups and book groups, codes of conduct and a rubric that clearly defines bullying and the associated consequences. Students are consistently reminded of bus rules and expectations, cafeteria, recess and playground rules. School council parent discussions related to school improvement plan goals, specialists using Second Step problem solving strategies and vocabulary, PSP and IPSP Training in Second Step, and new teacher training at elementary level also occur.                                                                                                         |
| 5-8    | Both Middle Schools have study groups pertaining to bullying and bullying prevention. These groups have been working to inform not only staff, but students and parents as well, of all aspects of bullying and prevention. Grade level meetings and assemblies address bullying and reinforce Second Step principles and positive social interaction skills. For example, both schools have worked closely with MARC (Massachusetts Aggression Reduction Center), based out of Bridgewater State University, to provide age-appropriate information to students and staff. Also, the middle schools have after school groups such as Live Smart which supports students in their ability to make positive decisions and reinforce the importance of a healthy lifestyle. Both middle schools participate in a Live Smart week, where each discipline in the school addresses a theme that is introduced each day and integrated into lessons. Other avenues include school improvement goals that relate to emotional and social well-being, book groups, student codes of conduct, and a rubric that clearly defines bullying and the associated consequences. |
| 5-8    | Guidance Counselors are supporters of the Second Step programs. The guidance counselors also go into classrooms to support the information that the Anti-Bullying groups, at each school, have established.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 9      | Kickoff Program for 9 <sup>th</sup> grade orientation, summer training/orientation /monthly meetings, PLUS Block- four years advisee/advisor training, PLUS Parent Seminar- Social Networking, House System promotes small school connections                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 10     | PLUS Parent Seminar social network issues, House System                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 11 -12 | Training for Mentors –Kick off Program, Captains meetings, PLUS Parent Seminar social network, House System                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| K-12   | Professional Training for all staff in the understanding of the new Anti-Bullying law and how we, as a school system, can implement it into our schools. This training/presentation is offered through the Middlesex Partnerships for Youth.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

**From:** [Chris Scott](#)  
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**Subject:** Please send Annual Report & Audit to School Committee Chair for distribution  
**Date:** Tuesday, December 16, 2025 11:32:07 AM  
**Attachments:** [FY25 Valley Collaborative Annual Report.pdf](#)  
[FY25 Valley Collaborative Audit Report.pdf](#)

---

Good morning,

Could you please ensure the attached Valley Collaborative's FY 25 Annual Report and FY 25 Audit is emailed to your school committee chair by January 1<sup>st</sup> as this is a regulatory deadline - [Massachusetts General Law c. 40, § 4E](#)<sup>[i]</sup>

Please also ensure these are placed on your next School Committee agenda for discussion and captured in meeting minutes.

As always, I appreciate your assistance and wish you and your loved ones happy holidays.

Best,  
Chris

*Chris A. Scott, Ph.D.*  
*Executive Director*



*11 Executive Park Drive  
N. Billerica, MA 01862  
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# Valley Collaborative 2025 Annual Report



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## General Information

*Name of the collaborative: Valley Collaborative*

### **Contact Information**

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**Address:**

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N. Billerica, MA 01862

**Phone:**

978-528-7800

**Website:** www.valleycollaborative.org

**Academic and fiscal year:** 2024-2025 – FY '25

## Valley Collaborative Mission

### **Mission Statement:**

To work collaboratively in order to create a diverse, equitable, inclusive, and responsive learning environment that recognizes individuals and empowers them to navigate confidently with optimal independence in their community and fosters lifelong learning.

### **Vision Statement:**

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

## Summary of Successes and Challenges

It has been an honor to work with Valley's committed staff to offer high quality special education services in the most fiscally responsible manner. Our collective work and dedication to Valley's mission has resulted in positive outcomes for students in our K-12 programs as well as participants in our DDS & MRC programs. I would like to thank Valley's Board Chair, Dr. Jay Lang, and the Board of Directors for their effective oversight, governance and generous support of this most important work. Valley is proudly owned and operated by nine member school districts. The Board of Directors and the school districts they represent are comprised of:

- **Dr. Jay Lang**, Chairman of the Board, Executive Committee Member, Superintendent - Chelmsford Public Schools
- **Dr. Kerry Clery**, Superintendent - Billerica Public Schools
- **Mr. Steven Stone**, Superintendent - Dracut Public Schools
- **Dr. Geoff Bruno**, Superintendent - Groton Dunstable Regional School District
- **Dr. Denise Pigeon**, Executive Committee Member, Superintendent - Nashoba Valley Technical School District
- **Mr. Brad Morgan**, Superintendent - North Middlesex Regional School District
- **Ms. Brenda Theriault-Regan**, Executive Committee Member, Superintendent - Tewksbury Public Schools
- **Dr. Michael Flanagan**, Executive Committee Member, Superintendent - Tyngsborough Public Schools
- **Dr. Christopher Chew**, Superintendent - Westford Public Schools

Valley's Tuition Rates continue to be extremely competitive and the lowest in the region. The table below offers comparisons between Valley's tuition rates and the averages across the state for two fiscal years. Valley's low tuition rates are the result of over a decade and a half of financial decisions that have resulted in an extremely strong balance sheet – the healthiest of all collaboratives in the state. Valley's OPEB trust is fully funded (\$9M), capital reserve fund is fully funded (\$1.5M), consistently invests \$1M annually in infrastructure updates, is fully staffed, 50% of its enrollment comes from non-member districts who pay a 25% premium to attend Valley's exemplary programming at a tuition rate that is still lower than most member district tuition rates at other Collaboratives (see table below). The financial stewardship on behalf of the Board of Directors and Valley administration results in Valley being able to offer tuition rates consistently below the circuit breaker threshold. Many of Valley's member districts are able to pay or receive a significant reduction in tuition rates each year because of Valley's surplus that is required to be returned to its member districts. This year the return was a total of \$1.2M, which again will offset already low tuition rates in FY26.

| <b>Tuition Rate Comparisons</b> |                                                    |
|---------------------------------|----------------------------------------------------|
| \$53,431                        | FY 26 Circuit Breaker Threshold                    |
| \$44,935                        | FY 26 Valley's Average Member District Tuition     |
| \$57,224                        | FY 26 Valley's Average Non Member District Tuition |
| \$63,382                        | FY 26 Average MA Collaborative Member Tuition      |
| \$99,067                        | FY 26 MAAPS (Private Schools) Average              |
| \$49,320                        | FY 27 Valley's Average Member District Tuition     |
| \$62,775                        | FY 27 Valley's Average Non Member District Tuition |

Valley was inundated with audits this past year. Our small but mighty team excels under pressure and tight timelines. Here's an overview:

- DESE Coordinated Program Review – Mid-Cycle Review: Valley has concluded its Mid-Cycle Review and the feedback from the DESE Office of Approved Special Education Schools (OASES) included, below.

**Results:** A+/Exemplary

- Administrative teams had an impressively long tenure. (This is significant because we are in a field where it is typical for key positions to be vacant and/or hard to fill. Fortunately, when people come to Valley, they fall in love with our mission and vision and stay for a very long time.)
- Students were engaged in rigorous curriculum/programming.
- They observed Valley's staff interacting with students in a caring and compassionate manner.
- Our systems throughout the Collaborative were consistent and followed with fidelity.
- Staff were well trained including but not limited to top tier therapeutic teams, educators who deliver high quality programs consistent with the state standards, and highly trained Special Education Assistants. (Valley's successful efforts to put into place the Academy for Special Education Assistants is noteworthy.)
- DESE protocols and procedures were followed with fidelity.
- Staff were committed and devoted to the mission of Valley.
- They wished that Valley could train other Collaboratives on how to do the exceptional work they witnessed.

- DESE Collaborative Financial Review:

Valley Collaborative received the results from the DESE Collaborative Financial Review performed by MARCUM Accounting for DESE in June 2025. I am pleased to report that Valley received an 'exemplary' score. MARCUM presented at MOEC's general membership meeting on October 7, 2024 and Valley was the case study/exemplar.

The Department of Elementary and Secondary Education continues to work through some technical matters regarding how certain DESE guidance and regulations are being interpreted by both Collaboratives across the Commonwealth and DESE with regards to the 25% Surplus Calculation. Valley has been instructed not to change how it has calculated the 25% surplus. Valley was proud to be a thought partner and one of the pilot sites for this new financial/governance review process that all Collaboratives will undergo every six years.

**Results:** A+/Exemplary

- FY'25 Independent Financial Audit: Valley's FY'25 Independent Financial Audit, performed by Fritz DeGuglielmo, LLC, has been completed. Daniel Schaffner, CPA, and his team. Valley is proud to say that the audit was again this year finding-free and demonstrates Valley's commitment to sound, competent, financial management/oversight. The Board of Directors and Valley's Administration team take very seriously its responsibility to be good stewards of public funds. Valley had another financially successful year in FY'25, ending the year with \$1.2M being returned to Member School Districts. Our systems and processes have never been more effective. Daniel Schaffner, CPA reported out to the Board at the November 20, 2025 Board of Directors meeting.

**Results:** A+/Exemplary

- DDS CORI Audit: for the first time, on September 24, 2024 DDS performed a CORI audit to ensure Valley Collaborative was in full-compliance with all procedures and protocols.

**Results:** A+/Exemplary

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

**Results:** A+/Exemplary

Please reach out if I can ever be of assistance. We are here to serve. My door is always open.

My best to you always,

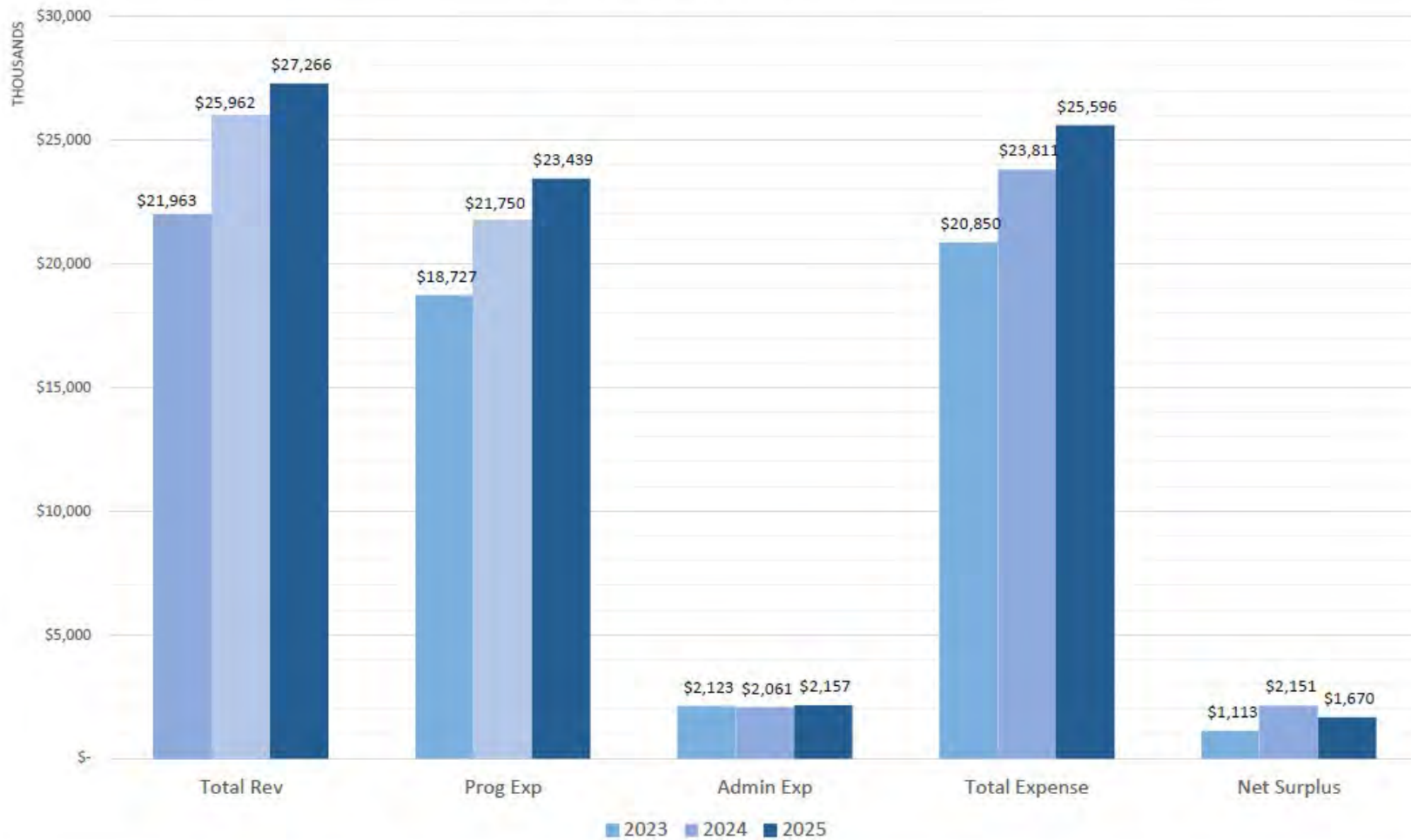
A handwritten signature in black ink, appearing to read "Chris A. Scott".

Chris A. Scott  
Executive Director  
Valley Collaborative

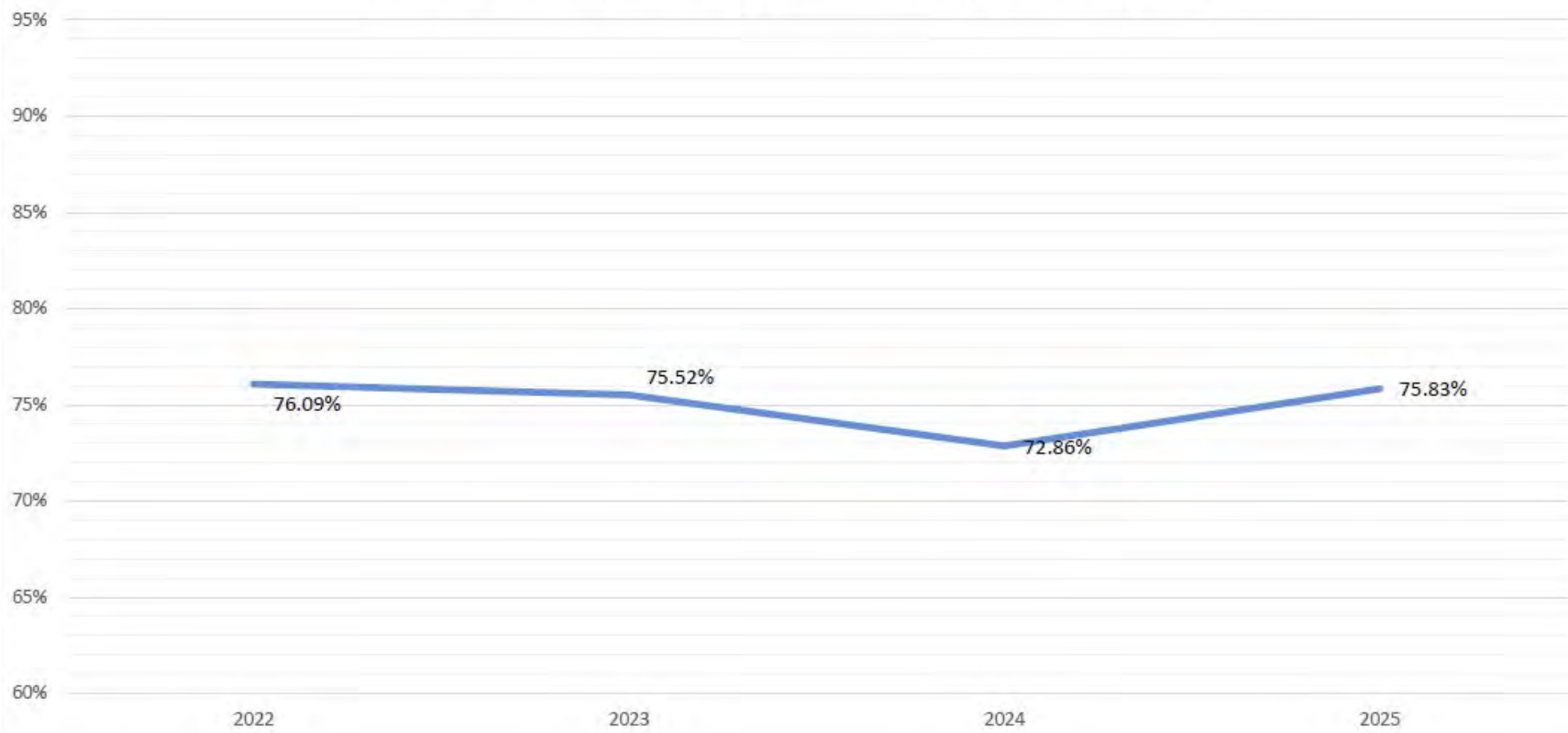
Valley Collaborative  
Summary of Financial Activity  
For the year ended June 30, 2025

## General Fund Activities

(Excludes Transportation and On-Behalf)

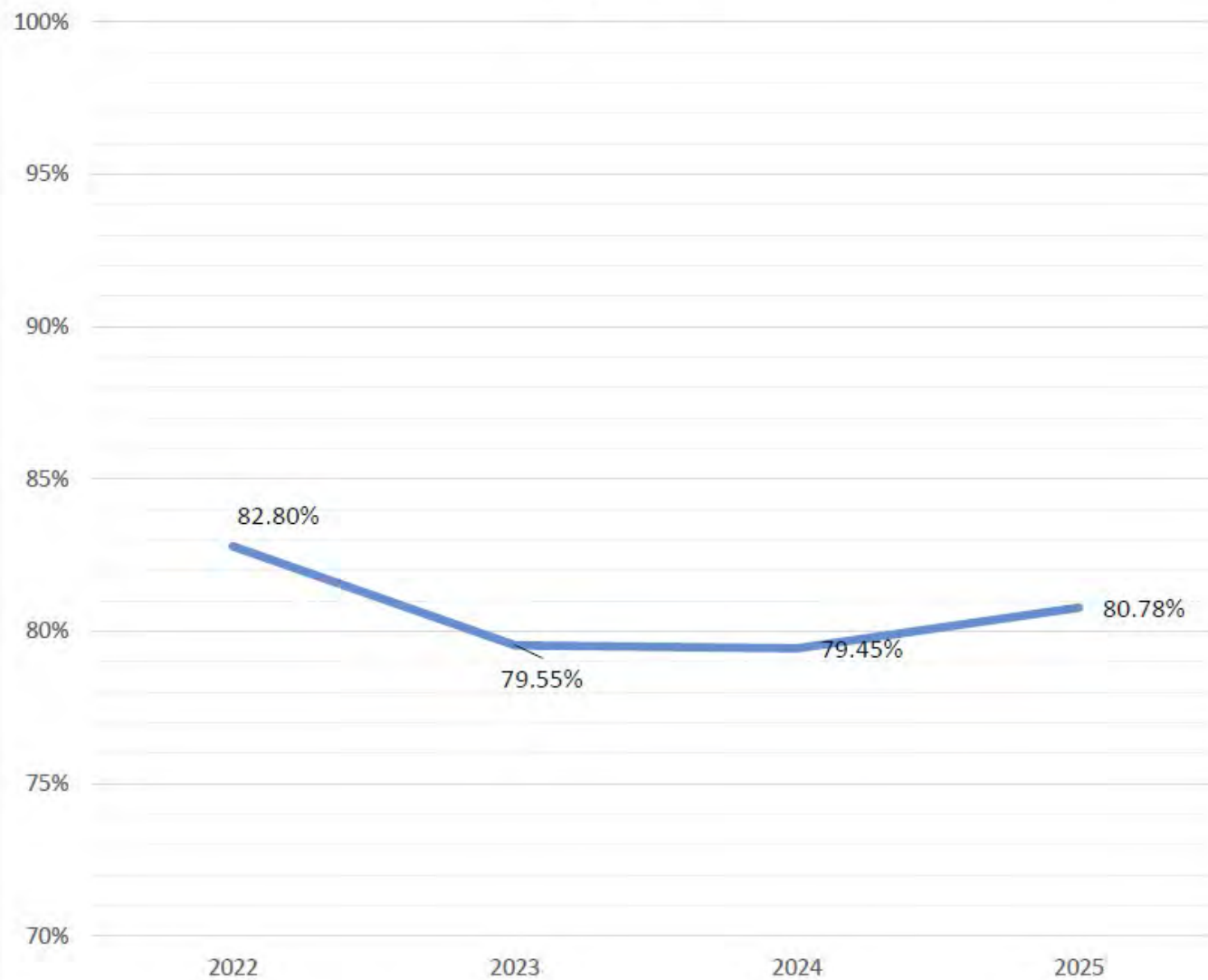


### Personnel Expense as a Percentage of Revenue

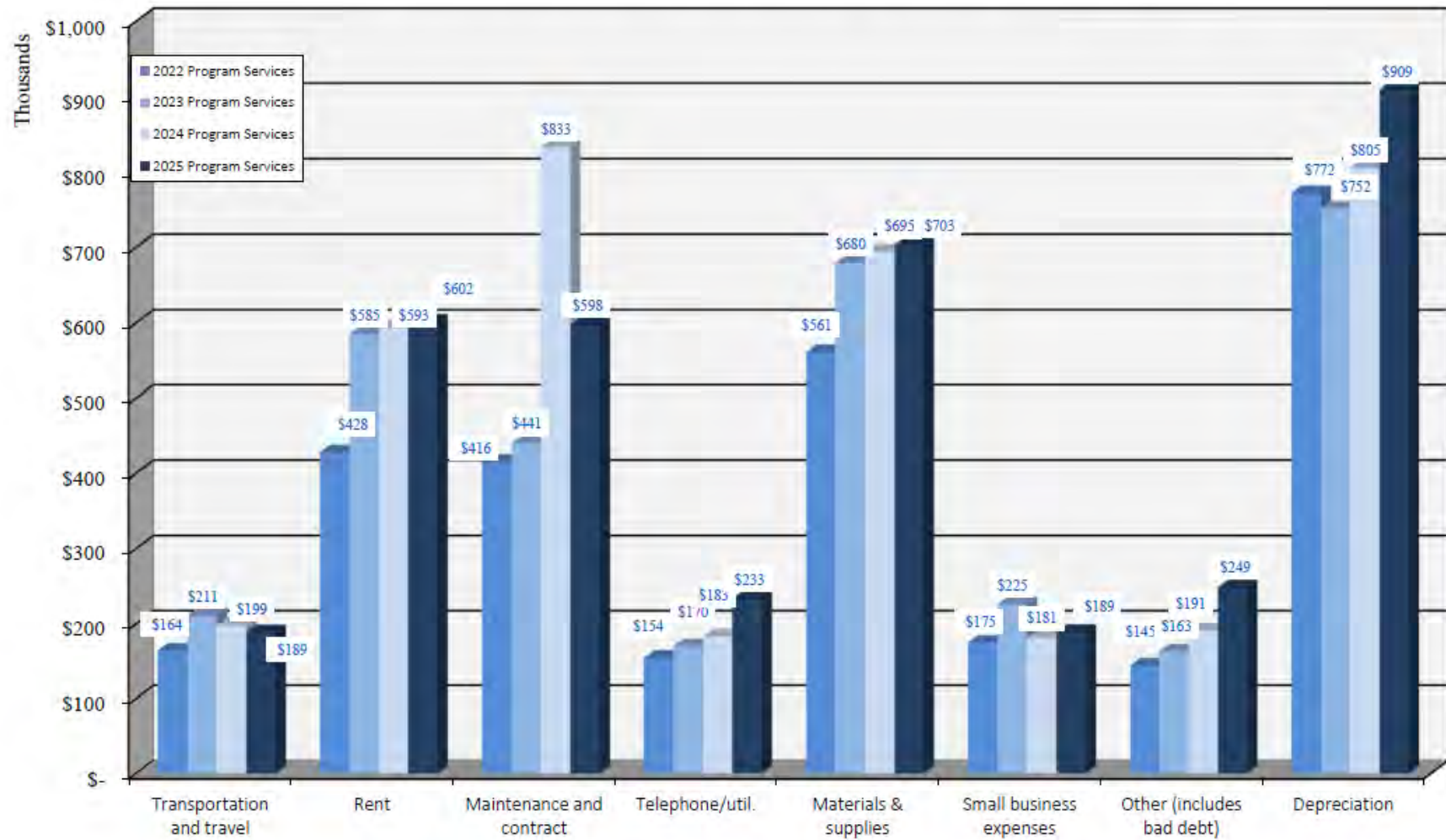




## Personnel Expense as a Percentage of Total Expense



## Program Expense Comparison (Excludes Payroll)



Derived from audited financial statements for discussion purposes only.

## Change(s) in Membership, Services, or Programs

None

## The Number of Years the Collaborative has been in Existence

Valley Collaborative was founded in 1976. It has been in existence for 49 years.

## Revenue and Expenditure Information for the Subject Year

Please see full financial audit, posted on the website and page 31 of this document, for further details.

## Governance and Leadership

### Board of Directors and Member Districts

The Valley Collaborative is governed by a Board of Directors comprising representatives from its nine member districts. The members of the Board of Directors in FY' 25 were:

Chairperson Dr. Jay Lang, Superintendent of the Chelmsford Public Schools  
Dr. Kerry Clery, Superintendent of the Billerica Public Schools  
Dr. Michael Flanagan, Superintendent of the Tyngsborough Public Schools  
Mr. Steven Stone, Superintendent of the Dracut Public Schools  
Dr. Laura Chesson, Superintendent of the Groton-Dunstable Regional School District  
Dr. Denise Pigeon, Superintendent of Nashoba Valley Technical School District  
Mr. Brad Morgan, Superintendent of the North Middlesex Regional School District  
Ms. Brenda Theriault-Regan, Superintendent of the Tewksbury Public Schools  
Dr. Christopher Chew, Superintendent of the Westford Public Schools

### Advisory Committee

Valley Collaborative's Board of Directors and District Planning Team currently act in an advisory committee role.

### Staffing Information

Valley Collaborative employs Department of Elementary and Secondary Education licensed teachers. The Collaborative's other professional staff includes licensed speech and language pathologists, occupational therapists, physical therapists, social workers, guidance counselors, board certified behavior analysts, music therapists, and nurses. In addition, the Collaborative contracts the services of a physician.

### Key Management and Program Staff

District Staff:

Dr. Chris A. Scott, Executive Director  
Mr. James George, Business Manager/Accountant  
Ms. Joia Mercurio, Deputy Director  
Ms. Kari Morrin, Director of Human Resources

Mr. Matthew Gentile, Director of DDS & MassAbility Services

Ms. Jessica Scalzi, Lead Nurse

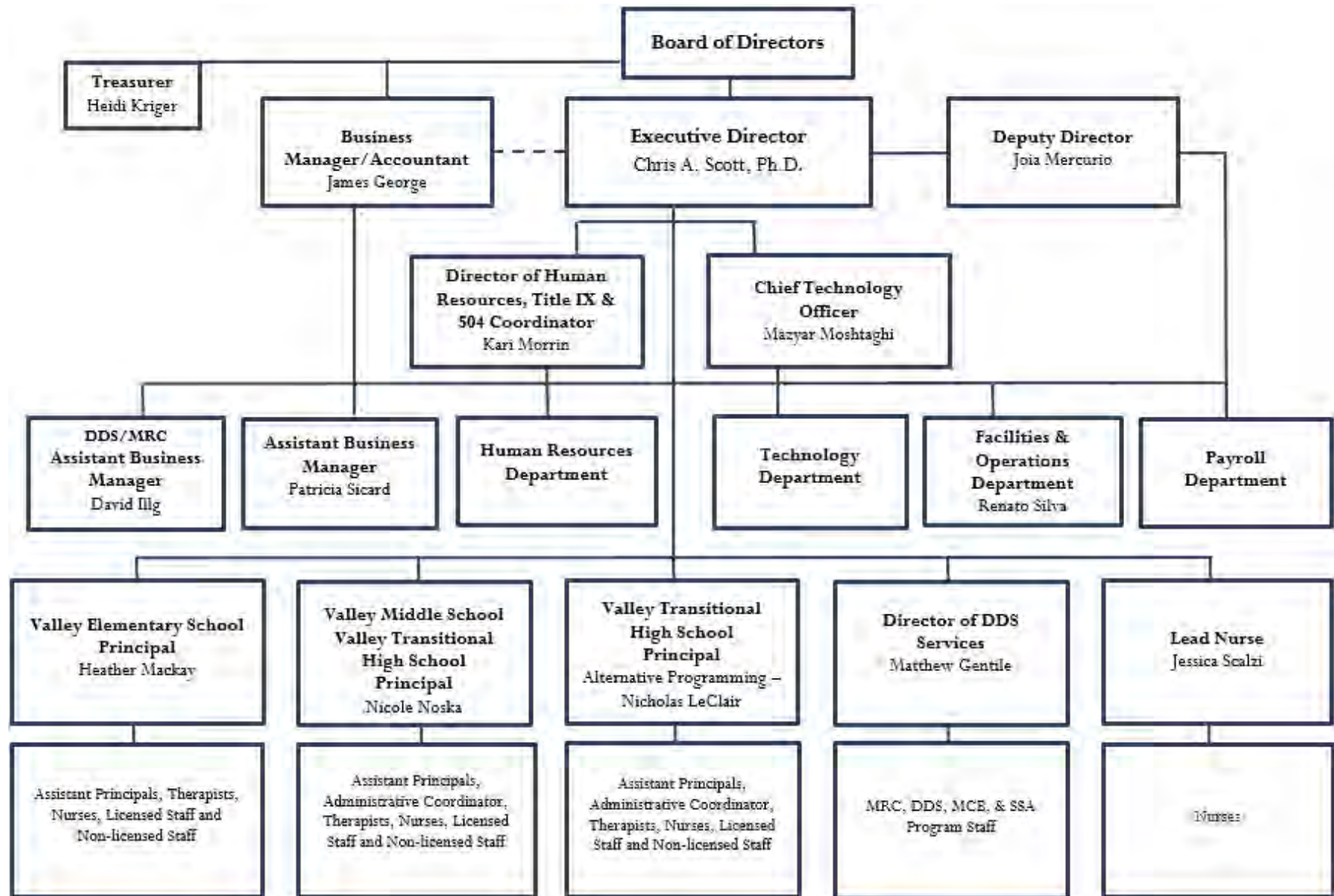
DESE Program Staff:

Ms. Heather MacKay, Principal, Valley Elementary School

Ms. Nicole Noska, Principal, Valley Middle School and Valley Transitional High School - Transitional

Mr. Nicholas LeClair, Principal, Valley Transitional High School - Alternative

## Valley Collaborative Organizational Chart



## Programs and Services Provided

The Collaborative offers the following types of programs and services, which complement and augment the educational programs and services of the member districts in a cost-effective manner.

- Day school placements and other programs and services, including educational, therapeutic, transitional, and occupational programs and services for students and individuals with disabilities.
- Professional Development programs for general and special educators.
- Other appropriate services and programs as may be established and approved by the Board of Directors of the Collaborative.

The programs offered to students continue to support their academic, transitional, emotional, and behavioral progress. Our K-Age 22 programs run September through June and offer additional summer programming. Valley's adult programs operate year-round. In addition, the Collaborative feels it is important for our students to have state-of-the-art adaptive technology that enables them to fully engage in the curriculum. To support the mission, the Collaborative continues to upgrade its technology in all schools. The Collaborative is committed to offering high quality programs in a fiscally responsible manner. A student-focused budget with a mission to improve student outcomes is always more cost-effective than a budget disconnected from the mission.

### 2024-2025 Average Number of Students

Valley Collaborative served 328 students (K-Age22) during the 2024-2025 school year. Valley's Adult Services served 137 individuals in our DDS program and 162 individuals in our MRC program.

### Program Offerings Overview

#### **K-12 Programs:**

Valley Elementary School  
Valley Middle School  
Valley Transitional High School

#### **Adult Programs:**

Valley's Today-and-Tomorrow Program  
Valley's Massachusetts Rehabilitation Commission Funded Programs  
Job Development

### Valley Elementary School

#### Location of the Programs

135 Coburn Road, Tyngsborough, MA

#### Arrangements with Member Districts to Maximize Integration Opportunities for Students Detailed Description of the Program

### Valley Elementary School

Valley Elementary School's goal is to provide a school experience for every child.

The Elementary program prides itself on providing an enriched school experience while supporting our students with the tailored therapeutic environment they require. All students have access to writing, reading, language arts, math, science and social studies instruction along with social and life skills

programming. Students access this curriculum throughout the school day via multi-modal approach. Our program is rich in trained professionals, supports, and technology specific to our population. Students participate in Physical Education, Art Education, and **Music Therapy** throughout the school week.

Our community engages in school-wide events according to monthly themes. Students help to plan and participate in our annual Science Fair, Thanksgiving Dinner, Halloween Dance, Holiday Fair, etc. One student is awarded “Student of the Month” each month. Community outings are common for all programs and allow students to generalize their skills to other settings. Our classrooms are equipped with technology such as smart boards, iPads, and chrome books to engage and enhance our curricula. The elementary school supports a greenhouse where students learn about gardening, the compost and can sampling herbs and vegetables after growing. In addition, we have a STEM lab that gives students a virtual reality learning experience using our zSpace desktops and V-R goggles along with educational content using our LEGO kits, Dash and Dot Robots and 3D printer.

Social Pragmatic classrooms take an ABA approach designed to meet the needs of students diagnosed with Autism, as well as students with pragmatic, sensory or behavioral needs. We use a team approach to provide each student with individualized behavior and academic supports.

Emotional Behavior classrooms provide a therapeutic environment for students who have emotional, behavioral or social adjustment difficulties that may limit their ability to make progress in a traditional school setting. Through a trauma informed lens, the classrooms use positive behavior support and collaborative problem solving to help students focus on school, develop relationships and build self-esteem. Our tailored approach and expert team ensure that every student has an individualized behavior and academic plan.

Our program has a wealth of therapists to assist our students and train our staff in the most current research-based intervention strategies. Our integrated therapy approach provides Board Certified Behavior Analysts, Speech/Language Pathologists, Occupational Therapists, Physical Therapists and Social Workers that work with the classroom staff to ensure the child’s range of needs are met. We also encourage families to participate in the school experience. Family events, volunteer opportunities and our Parent Advisory Group all provide a much-needed connection.

## [Valley Middle School](#)

### [Location of the Program](#)

40 Linnell Circle, Billerica, MA

### [Arrangements with Member Districts to Maximize Integration Opportunities for Students](#)

### [Detailed Description of the Program](#)

## **Our Goal**

Valley Middle School’s goal is to prepare students for successful adult living.

The Valley Middle School provides a supportive, therapeutic environment, tailored to meet students’ individual learning needs. Our school is staffed by trained professionals who help students discover their strengths, interests and abilities. Small class sizes, individual instruction and classroom technology keep



students motivated and engaged. In addition to a rich curriculum, students also have access to programs, including:

- social skills group
- life skills training
- art education
- music therapy
- electives, including band, cooking, school spirit, creative arts, health and wellness
- community based activities
- field trips
- experiential physical education

Emotional Behavioral (EB) classrooms provide a therapeutic setting for students who have emotional, behavioral or social adjustment difficulties that may have kept them from making progress in a traditional school setting. EB classrooms are appropriate for students with a range of cognitive abilities or learning disabilities, as well as those with executive functioning or behavior challenges. Pragmatic Social Behavior (PSB) classrooms provide services designed to meet the needs of students diagnosed with autism, as well as students with pragmatic, sensory or behavioral needs. The classrooms provide consistency, positive reinforcement and individual behavior support plans, as needed. The Interim Alternative Education Setting (IAES)/ Extended Evaluations allow our skilled professionals to assess what kinds of supports and therapeutic approaches will best help students meet their educational goals.

## Valley Transitional High School

### Location of the Program

40 Linnell Circle, Billerica, MA

### Arrangements with Member Districts to Maximize Integration Opportunities for Students

### Detailed Description of the Programs

#### ***Our Goal***

Valley Transitional High School's goal is to prepare students to become successful members of their communities.

Valley Transitional High School provides a supportive, therapeutic environment that assists students with their social, emotional, behavioral and academic needs. We seek to instill our students with the confidence and ability to successfully earn a high school diploma, transition into the workplace or a post-graduate program.

Valley Transitional High School classrooms provide a therapeutic setting for students who have social, emotional, behavioral or academic needs. Students develop transitional skills so that they are prepared to successfully enter college and the working world after graduating from high school. We offer a trusting, structured and safe environment that allows students to give and receive productive feedback from their peers, and encourages them to make positive choices. Students attend small classes taught by trained educators who use individualized instruction, state-of-the-art technology and innovative instructional strategies to engage and motivate them.

The Intensive Special Needs classroom provides comprehensive services to students with moderate to intensive physical, developmental and intellectual impairments. Our specialized instruction and expert staff is able to meet the needs of individual students. The curriculum focuses on academics, vocational, social and life skills.

### ***Vocational Opportunities***

Students have a variety of opportunities to develop vocational skills, including: culinary, [multimedia](#), restoration, and landscaping. We collaborate with local businesses and community groups to offer students the knowledge and work experience they will need for employment. [Seniors](#) can also participate in internships in the surrounding community. Community service opportunities allow students to develop a positive self-identity through volunteering.

### ***Additional Programming***

The Experiential Physical Education program gives students the opportunity to take positive risks and challenge themselves in order to develop leadership and problem-solving abilities, along with communication skills. Community service opportunities allow students to develop a positive self-identity through volunteering. Eligible students who are on track to graduate and in solid academic standing may also participate in dual enrollment and work study programs.

### ***Dual enrollment***

We provide distinctive dual enrollment options, empowering students to explore academic and vocational potential. Through strategic partnerships with local colleges, vocational training institutions, and educational agencies, students can enroll in courses aligning with their interests and career goals. This program enables them to earn college and trade school credits during high school, gaining hands-on experience in diverse vocational fields. If desired, students may also enroll in virtual high school classes not offered in our program.

Valley currently partners with the following organizations for dual enrollment:

- Middlesex Community College
- The Peterson School
- TEC Connections Academy

### ***Adult Services***

11 Executive Park Drive, North Billerica MA 01862

### ***Our Goal***

Valley Collaborative's Adult Services goal is to support our adult community in reaching lifelong goals and maximum independence by promoting self-determination. Self-Determination is having control in your life to make choices that influence your future based on preferences, beliefs and abilities.

Our Adult Services Department focuses on building a community that promotes individuality, independence and community inclusion. Valley Collaborative believes in a person-centered approach that

provides supports that help our community of adults realize maximum independence, rewarding experiences, diverse vocational opportunities and continual growth. Our programs are funded by the Executive Office of Health and Human Services (EOHHS) and the Social Security Administration (SSA) with oversight from The Department of Developmental Services (DDS), The Massachusetts Rehabilitation Commission (MRC) and The Massachusetts Commission for the Blind (MCB).

### Today and Tomorrow

Valley's Today & Tomorrow program provides full-time programming for individuals to support them in identifying and attaining their specific life goals. This is done through community integration and a robust curriculum that focuses on independent living, social skills, and vocational exploration and training. Individuals choose their own schedules and participate in a wide variety of activities at more than 30 community locations, as well as on-site at Valley. Individuals are the drivers of their programming and continually suggest new activities and locations for services which are incorporated into the service delivery model.

### Valley's Massachusetts Rehabilitation Commission Funded Programs

#### ***Valley's Evaluation & Training and Supported Employment Programs***

Valley's Evaluation & Training and Supported Employment Programs assist individuals in preparing for and obtaining competitive employment. Services can be short or long-term, and are provided based on the needs and availability of each person. Valley Collaborative's job development team has over 100 years combined experience in building community business partnerships and working to assist people with a wide range of disabilities prepare for, find and secure competitive employment.

### Job Development

#### ***Independent Employment Support Services***

Valley's Independent Employment Support Services provide individuals support in seeking out and maintaining competitive, independent employment. Services are specifically shaped and delivered to support individuals to reach their independent employment goals, with a Valley Collaborative Job Developer supporting the individual in all facets of gaining competitive, independent employment including but not limited to; interest inventorying, job exploration, matching of interests and specific employment fields, job searching, resume building, job application, interviewing, on-boarding and orientation, and continued support throughout employment with the individual and any potential supervisors on the job.

### Home and Work Transportation

Valley's Today and Tomorrow Program also provides transportation to and from the individuals residence. This service is essential to the individuals' success as it assures they will be able to access the program on a daily basis and in a timely manner. In addition, Valley provides transportation to individuals working independently in the community. Providing individuals transportation to and from independent employment breaks down a barrier that has long hindered their ability to access these specific types of opportunities in their community.

### Additional Services

The DESE/DDS Program - Designed to provide in-home services/wrap-around supports to school-age participants to help prevent a more restrictive educational or out-of-home residential placement. The parent/guardian of the participant becomes an active participant in the program. This includes collaborating

on the development of the participant's DESE/DDS Support Plan (DDSP) to help establish the current set of goals for the participant based on his/her needs. Families also help to determine how best to reach these goals with the help of the Valley in-home and community staff. The parent/guardian also plays a significant role in helping Valley determine how best to utilize the funds within the allowable guidelines.

## Therapeutic Services

Most of Valley's students receive one or more therapeutic services.

### Occupational Therapy, Speech Language Therapy, Physical Therapy, Behavioral Intervention Counseling and Social Work

The therapist(s) role in the Collaborative is to provide services to students through an integrated therapy model, which research supports as the most effective manner to provide services. Team collaboration is at the heart of the integrated therapy model. The team works together for the functional independence and success of the students. The team arrives at a shared set of goals for the students and implementation occurs across the routines of the day.

Using this model, therapists work with students within the classroom environment and during naturally occurring routines and activities. This helps reduce the student's need to generalize skills from a clinical or "pull out" model to realistic situations that occur with the classroom and school environments. It also increases opportunities for peer modeling and frequent practice of targeted objectives. Various therapists may also be in the classroom for the same block of time to "co- treat" or implement strategies that draw on their combined expertise.

This model also includes consultation, program monitoring, and staff training. Therapists train teaching staff to extend therapeutic interventions into classroom activities and other ongoing activities that occur throughout the student's day. The therapists determine recommendations for service delivery, develop IEP goals and benchmarks specific to discipline, actively engage members of the multidisciplinary team to best meet student's needs, consult with staff and other professionals to ensure generalization of newly learned skills, and implement staff training and parent education.

## Areas of Assessment and Treatment

### Occupational Therapy:

- Handwriting skills and keyboarding
- Fine motor skills
- Executive Functioning
- Activities of daily living(ADLs)
- Visual motor skills
- Visual perceptual skills
- Motor planning skills
- Sensory processing skills
- Upper extremity function
- Environmental modification
  - Upper extremity coordination
  - Sensory integration assessments

- Life skills

***Speech Language Pathology:***

- Pragmatics
- Speech sound production
- Resonance
- Phonology
- AAC
- Swallowing/feeding
- Voice
- Fluency
- Expressive and receptive language
- Cognition and executive functions
- Syntax and grammar
- Pro-social skills

***Physical Therapy:***

- Functional mobility
- Positioning to promote optimal participation
- Gross motor skills and motor planning
- Equipment assessment (wheelchairs, walkers, seating)
- Tonal inhibition and facilitation
- Posture
- Range of motion and strengthening
- Vendor consultation
- Orthotics management
- Core stability and strengthening

***Board Certified Behavioral Analysis:***

- Behavior support plans
- Functions of behavior
- Staff training
- Reinforce and motivation assessment
- Representation of graphs for data
- Data collection systems
- Discrete trial planning
- Parent training
- Skills assessments

***Counseling and Social Work***

A supportive therapeutic environment is an essential component of the student's overall experience at Valley. Valley's clinical component addresses student's social, emotional, developmental, and behavioral

needs. The clinical team, in conjunction with the teaching staff, BCBA's, speech and language therapists, occupational therapists, and physical therapists, identifies student's individual needs and addresses them through various approaches. Such approaches facilitate the development of self-awareness with the main objective to promote overall wellness and assist each student in reaching their full potential. The clinical team provides individual, group, and milieu counseling as well as crisis intervention and consultation to staff. They also provide a variety of assessments and participate in IEP meetings. Regular communication with family and outside providers and specialists is essential to maximizing a student's complete educational and therapeutic experience. Valley's clinical team is comprised of Massachusetts DESE certified school social workers/school adjustment counselors and guidance counselors. Social workers or school adjustment counselors also hold a Massachusetts state board license as either an LICSW, LCSW or LMHC as appropriate for their field.

### Medical Services

The nursing staff at Valley functions as part of the multidisciplinary team. It is our goal to promote the health, safety, and well-being of our students, as well as intervene with actual and potential health and behavioral health issues. In addition, when necessary, we manage complex medical issues and provide case management services. Our nurses' network with others to build student and family capacity for adaptation, optimal independence and self-advocacy. We are a multifaceted group that provides professional nursing services to students to enhance their well-being, academic success, and lifelong achievement. Along with the educational advancement of our students, the nurses at Valley are active in their own professional growth and are actively engaged with other professional organizations. All Collaborative students benefit from medical assistance, health promotion, disease surveillance and intervention of acute and chronic conditions. The Collaborative is in compliance with Massachusetts DESE and Massachusetts Department of Public Health regulation. We employ two full-time Registered Nurses, one at our Valley Elementary School and one at our Transitional Middle/High School. We are staffed with an LPN at each of our schools as well. The Adult Services program is staffed with an LPN to assist with acute and chronic medical conditions for our over 22 individuals.

### Assessment Services

#### Interim-Alternative Education Setting/ Extended Evaluations

Valley's Interim-Alternative Education Setting/ Extended Evaluations assist in determining interventions that will aid students with increasing his/her ability to perform successfully within an educational setting. The program also addresses the therapeutic needs of each student. Psychosocial needs are accessed via formal and informal assessments, while utilizing a holistic approach.

At, or before, the end of 45 days, a written report is presented at a team meeting where intervention strategies are discussed, as well as descriptions of the type of educational setting that will best meet the student's needs.

#### Augmented and Alternative Communication Services and Evaluations

Valley Collaborative provides expert AAC evaluation and support for students, parents and staff in order to facilitate student communication. Augmentative and alternative communication (AAC) includes all forms of communication (other than oral speech) that are used to express thoughts, needs, wants, and ideas. Valley Collaborative offers speech- language pathology services specializing in augmentative and alternative

communication (AAC) and language development for AAC users.

Valley Collaborative provides comprehensive AAC evaluations at competitive rates. Our expert team can determine student needs and determine a plan of action, while providing ongoing support for students and staff beyond the evaluation period. AAC evaluations, direct therapy and consultative services are provided by certified speech-language pathologists. Valley offers:

- 30-day evaluation period
- Skilled observation, assessment and recommendations
- Implementation
- AAC device trials
- Technology assistance
- Ongoing support and consultation

### Transition Services and Assessments

Valley's goal with transition services is to help students make successful transitions to life beyond school. Students who are transitioning from school to employment and community benefit from a variety of resources and support. Valley Collaborative provides a comprehensive approach to helping students, families, and school districts navigate the transition process. Valley's transition services are age appropriate and highly individualized. Our transition specialist is a DESE licensed special educator who specializes in transition services and has an extensive background in vocational services, serving both students and adults. Valley has developed transition tools, assessments, and individualized programming for students with a wide range of strengths and needs.

### **Transitioning to Employment and Life after School**

Valley's expert transition specialist helps students transition to the fullest life possible after school, including appropriate employment and/or independent living. Our transition assessment process begins by assessing student readiness for the workplace and/or pre-vocational training including interests, skills, intellectual functioning, sensory and motor abilities, coping/adaptive behavior, employability and "soft skills." Valley also offers planning assistance for students transitioning to post-secondary education. Valley's transition specialist assesses the attributes and "soft skills" associated with self-determination including personal strengths, work preferences, self-advocacy, self-regulation, autonomy and psychological empowerment. For students moving towards independent living, Valley provides assessments of transition skills, adaptive living skills, social skills and leisure skills.

### ***Assisting Districts***

Valley's expert staff and extensive resources enable us to provide districts with an ongoing, tiered set of transition services. Valley's transition services streamline the transition process and assist districts in meeting the guidelines set forth in IDEA indicator 13 of the U.S. Department of Education, Office of Special Education programs State Performance Plan Indicators. In addition to assessments, Valley offers consultation, professional development, job coaching, and job development to districts.

### Vocational Services

Valley's expert transition specialist helps students transition to the fullest life possible after school, including appropriate employment and/or independent living. Our transition assessment process begins by assessing student readiness for the workplace and/or pre-vocational training including interests, skills,

intellectual functioning, sensory and motor abilities, coping/adaptive behavior, employability and “soft skills.” Valley also offers planning assistance for students transitioning to post-secondary education. Valley’s transition specialist assesses the attributes and “soft skills” associated with self-determination including personal strengths, work preferences, self-advocacy, self-regulation, autonomy and psychological empowerment. For students moving towards independent living, Valley provides assessments of transition skills, adaptive living skills, social skills and leisure skills.

### Contract Services

Valley Collaborative provides contract services to those districts in need. A contract service is a service that a district requires in their own district and is not provided to a student enrolled in a Valley Collaborative program and can include but is not limited to:

- Therapy (Speech, Occupational & Physical)
- Transition Specialist
- Counseling
- ABA Therapist
- Board Certified Behavior Analyst
- Tutoring
- One-on-one Aide
- One-on-one Nurse
- Restraint Training

A Valley Collaborative Member or Non-Member District may also contract with Valley Collaborative for an assessment for a non-Valley student. The contract services assessments available to districts include:

- Speech Language Evaluation
- Augmentative and Alternative Communication (AAC) Evaluation
- Occupational Therapy Evaluation
- Physical Therapy Evaluation
- Functional Behavioral Assessment
- Transition Assessments
  - Sensory-motor
  - Gross & Fine Motor
  - Coping/Adaptive Behavior
  - Strengths, Preferences and Interests
  - Work Adjustment, Job Readiness
  - Autonomous Living
  - Learning Style
  - Student Observation
  - Adaptive Living
  - Transition
  - Self-Determination
  - Social
  - Employability
  - Person-Centered Planning



- Observational Assessment

Throughout the 2022-2023 school year, Valley provided 7 contracted services to its member districts for students/individuals in their own districts.

### Professional Development

The Valley Collaborative offers a limited array of professional development. The professional development is primarily directed to our staff and in some instances includes staff from its member districts.

### Cooperative Purchasing

The Collaborative does not offer cooperative purchasing.

### Joint Transportation

The Collaborative does not offer joint transportation but participates in it.

### Medicaid Billing

The Collaborative does not offer Medicaid billing services but participates in it.

### Outreach and Partnerships

#### Member School Districts

Communication and outreach are key to our success. An annual member district meeting is held in January to review the Annual Report and the Collaborative financials. Member district Superintendents, School Committee Members, Business Directors, Special Education Directors, and members of the public are invited to attend. In addition, the Collaborative hosts periodically a meeting for all its member districts' Special Education Directors. Each meeting has a working agenda of issues we need to collaborate on to better serve our students. Furthermore, the Executive Director meets with member districts and School Committee members to inform them of the progress we are making at the Collaborative, to present financial updates and to obtain various approvals when necessary.

#### Community-at-large Outreach

The Collaborative also publishes a quarterly Newsletter which is sent to more than 500 families and state officials, agencies, and businesses. In addition, each school publishes its own Newsletter. If you would like to be on the distribution list, please contact us.

The Collaborative has a newly developed website: [www.valleycollaborative.org](http://www.valleycollaborative.org)

The Valley Collaborative participates in the Massachusetts Dual Enrollment Program and enrolls students with disabilities at the Middlesex Community College. The Dual Enrollment Program at the Collaborative serves students with moderate and severe disabilities, and supports college and career success through the provision of a free and appropriate public education in the least restrictive environment. The program:

- Promotes and enhances academic, social, functional, integrated competitive employment skills, and other transition-related goals;
- Provides opportunities for the inclusion of students with moderate and severe disabilities in credit

- and non-credit courses alongside their non-disabled peers;
- Promotes participation in the student life of the college community.

## Cost Effectiveness of Programs and Services

Please note, Valley Collaborative prides itself in providing its member districts with superb special education programming for its out-of-district students as well as limited contracted services support. Tuition rates have been compared based on program descriptions. Given the differences among programs and services, a proper cost-effective analysis is almost impossible without requiring full disclosure of student to staff ratio per program and transparency on the therapies included in the cost of a tuition rate. I would be happy to discuss how a cost-effective analysis could be more meaningful and accurate if the proper data points were made public.

## Service Fees Comparisons

| <b>FY '25 VALLEY COLLABORTATIVE VS. PRIVATE SCHOOLS TUITION RATES</b> |                       |                      |                                |                     |                   |               |                              |                                 |                              |                         |                         |
|-----------------------------------------------------------------------|-----------------------|----------------------|--------------------------------|---------------------|-------------------|---------------|------------------------------|---------------------------------|------------------------------|-------------------------|-------------------------|
| Valley Collaborative Program                                          | Boston Higashi School | Cotting School, Inc. | Franciscan Children's Hospital | Landmark Foundation | Lighthouse School | May Institute | Nashoba Learning Group, Inc. | New England Center for Children | Seven Hills Foundation, Inc. | League School of Boston | Private Schools Average |
| Intensive Special Needs (ISN)                                         |                       |                      | \$645.26                       |                     |                   |               |                              | \$694.49                        |                              |                         | \$669.88                |
| Elementary School - Emotional Behavioral                              | \$466.42              | \$640.40             |                                |                     | \$732.19          | \$651.30      | \$638.37                     |                                 | \$256.62                     | \$609.99                | \$570.76                |
| Elementary School - Pragmatic, Sensory, and Behavior                  | \$466.42              | \$640.40             |                                |                     | \$732.19          | \$651.30      | \$638.37                     |                                 | \$256.62                     | \$609.99                | \$570.76                |
| Middle School - Emotional Behavioral                                  | \$466.42              | \$640.40             |                                |                     |                   | \$651.30      | \$638.37                     |                                 | \$256.62                     |                         | \$530.62                |
| Middle School – Pragmatic, Sensory, and Behavior                      | \$466.42              | \$640.40             |                                |                     |                   | \$651.30      | \$638.37                     |                                 | \$256.62                     |                         | \$530.62                |
| High School & Middle School - School & Life Skills Training ISN       | \$466.42              | \$640.40             | \$645.26                       |                     | \$732.19          |               | \$638.37                     |                                 | \$256.62                     | \$609.99                | \$569.89                |
| High School - School & Vocational Training                            |                       | \$640.40             | \$645.26                       |                     | \$732.19          |               | \$638.37                     |                                 | \$256.62                     |                         | \$582.57                |
| High School - School & Life Skills Training                           | \$466.42              | \$640.40             | \$645.26                       |                     | \$732.19          | \$651.30      | \$638.37                     |                                 | \$256.62                     | \$609.99                | \$580.07                |
| High School - School to Work Program                                  |                       |                      |                                |                     |                   |               |                              |                                 |                              |                         | N/A                     |
| High School - Alternative Program                                     |                       |                      |                                | 400.43              | \$732.19          |               |                              |                                 |                              | \$609.99                | \$580.87                |
| High School - Alternative Vocational Program                          |                       |                      |                                |                     |                   |               |                              |                                 |                              |                         | N/A                     |

## Quantitative Comparisons to Private Schools

### FY '25 VALLEY MEMBER & NON-MEMBER TUTION RATES VS. PRIVATE SCHOOLS\*

| Valley Collaborative Program                                    | Private Schools Average | Member District Per Diem Tuition | Member District Per Diem Savings | Member District Percent Cost Savings | Non- Member District Per Diem Tuition | Non- Member District Per Diem Savings | Non- Member District Percent Cost Savings |
|-----------------------------------------------------------------|-------------------------|----------------------------------|----------------------------------|--------------------------------------|---------------------------------------|---------------------------------------|-------------------------------------------|
| Intensive Special Needs (ISN)                                   | \$669.88                | \$306.00                         | \$363.88                         | 54%                                  | \$390.00                              | \$279.88                              | 42%                                       |
| Elementary School - Emotional Behavioral                        | \$570.76                | \$250.00                         | \$206.16                         | 36%                                  | \$319.00                              | \$251.76                              | 44%                                       |
| Elementary School - Pragmatic, Sensory, and Behavior            | \$570.76                | \$250.00                         | \$206.16                         | 36%                                  | \$319.00                              | \$251.76                              | 44%                                       |
| Middle School - Emotional Behavioral                            | \$530.62                | \$250.00                         | \$188.23                         | 35%                                  | \$319.00                              | \$211.62                              | 40%                                       |
| Middle School – Pragmatic, Sensory, and Behavior                | \$530.62                | \$250.00                         | \$188.23                         | 35%                                  | \$319.00                              | \$211.62                              | 40%                                       |
| High School & Middle School - School & Life Skills Training ISN | \$569.89                | \$306.00                         | \$146.40                         | 26%                                  | \$390.00                              | \$179.89                              | 32%                                       |
| High School - School & Vocational Training                      | \$582.57                | \$203.00                         | \$265.53                         | 46%                                  | \$259.00                              | \$323.57                              | 56%                                       |
| High School - School & Life Skills Training                     | \$580.07                | \$203.00                         | \$271.41                         | 47%                                  | \$259.00                              | \$321.07                              | 55%                                       |
| High School - School to Work Program                            |                         | \$203.00                         | N/A                              | N/A                                  | \$259.00                              | N/A                                   | N/A                                       |
| High School - Alternative Program                               | \$580.87                | \$219.00                         | \$223.97                         | 39%                                  | \$279.00                              | \$301.87                              | 52%                                       |
| High School - Alternative Vocational Program                    |                         | \$219.00                         | N/A                              | N/A                                  | \$279.00                              | N/A                                   | N/A                                       |

## FY'25 Financial Audit Summary & Cumulative Surplus Calculation Worksheet

**Valley Collaborative**

Financial Statements

For the Year Ended June 30, 2025

**Valley Collaborative**  
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For the Year Ended June 30, 2025

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**FRITZ DEGUGLIELMO LLC**  
**CERTIFIED PUBLIC ACCOUNTANTS**  
**& BUSINESS ADVISORS**

**INDEPENDENT AUDITOR'S REPORT**

To the Board of Directors of  
Valley Collaborative  
North Billerica, Massachusetts

**Report on the Audit of the Financial Statements**

**Opinions**

We have audited the accompanying financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of Valley Collaborative, a collaborative organized under the Laws of the Commonwealth of Massachusetts, as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise Valley Collaborative's basic financial statements as listed in the table of contents.

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

***Basis for Opinions***

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

**Responsibilities of Management for the Financial Statements**

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

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

**Auditor's Responsibilities for the Audit of the Financial Statements**

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



likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

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

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

#### **Required Supplementary Information**

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis, budgetary comparison information, OPEB plan required supplementary information and pension schedules on pages 3-7 and 32-38 be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

#### **Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated November 20, 2025, on our consideration of Valley Collaborative's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of Valley Collaborative's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Valley Collaborative's internal control over financial reporting and compliance.



Certified Public Accountants

Newburyport, Massachusetts  
November 20, 2025

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

Our discussion and analysis of Valley Collaborative's ("The Collaborative") financial performance provides an overview of the Collaborative's financial activities for the fiscal year ended June 30, 2025 with comparative information from the fiscal years ended June 30, 2024 and 2023. Please read it in conjunction with the financial statements that begin on page 8.

**Overview of Financial Statements**

This discussion and analysis is intended to serve as an introduction to the Collaborative's financial statements. The Collaborative's financial statements comprise three components: 1) government-wide financial statements; 2) fund financial statements; and 3) notes to the financial statements. This report also contains other supplementary information in addition to the basic financial statements themselves.

**Government-wide Statements:**

The government-wide financial statements report information about the Collaborative as a whole using accounting methods similar to those used by private sector companies.

- The **Statement of Net Position** presents information on all of the Collaborative's assets and liabilities with the difference between the two reported as net position. It is one way of measuring the Collaborative's financial health or position.
- The **Statement of Activities** presents information showing how the Collaborative's net position changed during the most recent fiscal year. All of the current year's revenues and expenses are accounted for in the Statement of Activities regardless of when cash is received or paid.

Over time, increases or decreases in the Collaborative's net position is an indicator of whether its financial position is improving or deteriorating. The reader will also need to consider other non-financial factors such as changes in economic conditions when evaluating the overall financial health of the Collaborative.

**Fund Financial Statements:**

Funds are accounting devices used to keep track of specific sources of funding and spending in particular categories: governmental funds, proprietary funds, and fiduciary funds. Presently, the Collaborative has only governmental and fiduciary funds.

- **Governmental funds** – The Collaborative's basic services are included in governmental funds, which generally focus on: 1) how cash and other financial assets that can readily be converted to cash flow in and out, and 2) the balances left at year-end that are available for spending. Consequently, the governmental funds statements provide a detailed short-term view that helps to determine whether there are more or fewer financial resources that can be spent in the near future to finance the Collaborative's programs. Because this information does not encompass the additional long-term focus of the government-wide statements, additional information (reconciliation schedules) is provided following the governmental funds statements that explains the relationship (or differences) between these two types of financial statement presentations.
- **Fiduciary fund** – Fiduciary funds are used to account for resources held for the benefit of parties outside the government. Fiduciary funds are not reflected in the government-wide financial statements because the resources of those funds are not available to support the Collaborative's own programs.

**Notes to the Financial Statements:**

The Notes to the Financial Statements provide additional information that is essential to a full understanding of the information provided in the Collaborative's financial statements.

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

**Required Supplementary Information:**

In addition to the basic financial statements and accompanying notes, this report also presents certain required supplementary information which is required to be disclosed by accounting principles generally accepted in the United States of America.

**Government-Wide Financial Highlights**

**Collaborative's Net Position:**

ASSETS AND DEFERRED OUTFLOWS OF RESOURCES

|                                                 | <u>2025</u>         | <u>2024</u>         | <u>2023</u>         |
|-------------------------------------------------|---------------------|---------------------|---------------------|
| Assets                                          |                     |                     |                     |
| Current Assets                                  | \$10,763,763        | \$11,859,954        | \$ 9,638,049        |
| Non-current assets, net**                       | <u>9,107,606</u>    | <u>9,718,962</u>    | <u>10,385,960</u>   |
| Total Assets                                    | <u>19,871,369</u>   | <u>21,578,916</u>   | <u>20,024,009</u>   |
| Deferred Outflows Related to OPEB               | <u>947,666</u>      | <u>1,090,530</u>    | <u>1,943,312</u>    |
| Total Assets and Deferred Outflows of Resources | <u>\$20,819,035</u> | <u>\$22,669,446</u> | <u>\$21,967,321</u> |

LIABILITIES, DEFERRED INFLOWS OF RESOURCES AND NET POSITION

|                                                       |                     |                     |                     |
|-------------------------------------------------------|---------------------|---------------------|---------------------|
| Liabilities                                           |                     |                     |                     |
| Current Liabilities                                   | \$ 1,880,184        | \$ 3,163,986        | \$ 2,933,189        |
| Long Term Liabilities**                               | <u>4,550,391</u>    | <u>4,057,503</u>    | <u>4,925,869</u>    |
| Total Liabilities                                     | <u>6,430,575</u>    | <u>7,221,489</u>    | <u>7,859,058</u>    |
| Deferred Inflows Related to OPEB                      | <u>2,724,696</u>    | <u>3,285,540</u>    | <u>3,037,142</u>    |
| Net Position                                          |                     |                     |                     |
| Unrestricted                                          | \$ 3,787,127        | \$ 4,023,633        | \$ 2,658,926        |
| Restricted – grants and contributions                 | 46,002              | 37,641              | 30,583              |
| Restricted – renovation project/capital reserve       | 1,500,000           | 1,500,000           | 1,500,000           |
| Invested in right-of-use assets, net of liabilities** | ( 282,600)          | ( 147,684)          | ( 58,449)           |
| Invested in capital assets, net of related debt       | <u>6,613,235</u>    | <u>6,748,827</u>    | <u>6,940,061</u>    |
| Total Net Position                                    | <u>\$11,663,764</u> | <u>\$12,162,147</u> | <u>\$11,071,121</u> |

During the fiscal year ended June 30, 2025, the Collaborative's overall net position decreased by approximately \$499,000. Total assets decreased by approximately \$2,608,000 primarily as a result of payment of the prior year credit to the member districts as well as the continued depreciation of assets and amortization of the right-of-use leased assets. Total liabilities decreased by approximately \$791,000, which was primarily the result of the decrease in the year's pay down of lease liability of approximately \$341,000, timing of paying various accounts payable of approximately \$648,000, and a decrease in prepaid tuition of approximately \$510,000, net of an increase of approximately \$770,000 in net OPEB liability due to the updated actuarial calculations. The Collaborative realized a decrease in net position from operations of approximately \$499,000, including issuance of prior year member credits, depreciation on capital assets, right-of-use lease expense and other postemployment benefits expense.

During the fiscal year ended June 30, 2024, the Collaborative's overall net position increased by approximately \$1,091,000. Total assets increased by approximately \$1,555,000 primarily as a result of continued strong operations and oversight increasing the overall cash position of the Collaborative. Total liabilities decreased by approximately \$638,000 which was primarily the result of the decrease in the year's pay down of lease liability of approximately \$387,000 and the adjustment in the OPEB liability of approximately \$588,000 due to the updated actuarial study and \$758,000 as a result of the timing of the payback of credit to the member districts that occurred in fiscal year 2023 but not in fiscal year 2024. Liabilities also increased by \$510,000 in prepaid tuition paid by two of the member districts in comparison to fiscal year 2023. The remaining difference is a result of the timing of payments in

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

comparison to the prior fiscal year relating to the various accrued expenses and payables. The Collaborative realized an increase in net position from operations, including depreciation on capital assets, right-of-use lease expense and other postemployment benefits expense, of approximately \$1,091,000.

**SUMMARY OF ACTIVITIES**

|                                                                                                                     | <u>2025</u>         | <u>2024</u>        | <u>2023</u>       |
|---------------------------------------------------------------------------------------------------------------------|---------------------|--------------------|-------------------|
| Revenues/Gains*                                                                                                     | \$27,413,028        | \$26,075,648       | \$21,984,406      |
| Program Expenses/Losses*                                                                                            | 23,691,319          | 22,030,507         | 19,048,642        |
| Administrative Expenses/Losses*                                                                                     | <u>2,172,402</u>    | <u>2,075,632</u>   | <u>2,137,683</u>  |
| Total Expense*                                                                                                      | <u>25,863,721</u>   | <u>24,106,139</u>  | <u>21,186,325</u> |
| Change in net position, before increase in net retirement health benefit obligation and credits to member districts |                     |                    |                   |
|                                                                                                                     | 1,549,307           | 1,969,509          | 798,081           |
| Increase in net retirement health benefit obligation                                                                | <u>(352,138)</u>    | <u>(573,661)</u>   | <u>(643,839)</u>  |
| Change in net position before credits to member districts                                                           |                     |                    |                   |
|                                                                                                                     | 1,197,169           | 1,395,848          | 154,242           |
| Credits to member districts                                                                                         | <u>( 1,695,822)</u> | <u>( 304,552)</u>  | <u>( 815,609)</u> |
| Change in Net Position                                                                                              | <u>(\$ 498,653)</u> | <u>\$1,091,296</u> | <u>\$ 380,887</u> |

\* Excludes Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, credits to members, and other postemployment benefits funding and expense.

Revenues

In the fiscal year ended June 30, 2025, revenues, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, increased by approximately \$1,337,000 (6%). In the fiscal year ended June 30, 2024, revenues, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, increased by approximately \$4,091,000 (19%). The changes within fiscal years are due primarily to changes in student enrollment in the respective years. Changes in fiscal year 2025 enrollment are primarily a result of expanding of programs and offerings to the area districts.

Operating Expenses

In the fiscal year ended June 30, 2025, operating expenses, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, increased by approximately \$1,758,000, or 8%, compared to the fiscal year ended June 30, 2024. Increases in expenses were primarily a result of increased employee and benefit costs. Personnel costs increased by approximately \$1,728,000 in the fiscal year ended June 30, 2025 as a result for the increase in staffing needs to support operations. There were various other small increases Collaborative wide to support the continued growth.

In the fiscal year ended June 30, 2024, operating expenses, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, increased by approximately \$2,920,000, or 14%, compared to the fiscal year ended June 30, 2023. Increases in expenses were primarily a result of increased employee and benefit costs, as well as maintenance and occupancy costs. Personnel costs increased by approximately \$2,395,000 in the fiscal year ended June 30, 2024 as a result for the increase in staffing needs to support operations. Maintenance and occupancy costs increased by approximately \$480,000 and training expenses increased by approximately \$20,000. Maintenance and occupancy costs increased as a result of the repairs and updates made across the properties occupied by the Collaborative as well as general increases in utilities. Training expenses saw increases as a result of the increase in new staff employed by the Collaborative as well as the full integration of the SPEDfi program and getting all users acclimated to the system.

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

**Governmental Funds Financial Highlights**

The Collaborative reported a total general fund balance of \$7,614,806, of which \$44,286 was nonspendable and the remaining \$7,570,520 was unassigned. The fund balance increased \$115,632 over the prior fiscal year, as the result of a net operating surplus of \$1,670,454, plus \$141,000 received as trade-in value for vehicles disposed of to be used against the purchase price of new vehicles and decreased by \$1,695,822 of credits issued to member districts. Prepaid expenses decreased by \$2,094, Accounts receivable decreased by \$997,436, primarily due to increased collection efforts. Cash decreased by \$96,661.

Due to strong management, since the year ended June 30, 2013, the Collaborative has returned more than \$13,815,000 from its general fund in the form of cash and tuition credits to its member districts.

**CAPITAL ASSETS AND OTHER OBLIGATIONS**

During the fiscal year ended June 30, 2025 the Collaborative purchased and capitalized eleven vehicles, leasehold improvements and other equipment for use in its program with a total cost of \$791,751. The Collaborative did trade in nine vehicles in fiscal year 2025 totaling a trade-in value of \$141,000.

During the fiscal year ended June 30, 2024, the Collaborative purchased and capitalized eight vehicles, leasehold improvements and other equipment for use in its program with a total cost of \$613,951. The Collaborative did trade in seven vehicles in fiscal year 2024 totaling a trade-in value of \$91,800.

As of June 30, 2025, the balance in the capital reserve fund was \$1,500,000, and fully funded. This fund is considered restricted until utilized for its intended purpose.

**SUBSCRIPTION BASED INFORMATION TECHNOLOGY ARRANGEMENT (SBITA) &  
LEASED ASSETS AND LIABILITIES**

During 2023, the Collaborative implemented GASB Statement No. 96 which requires recording right-of-use SBITA assets and related liabilities for all long-term SBITAs. The Collaborative evaluated its contracts effective July 1, 2024 and determined that the Collaborative had no agreements that exceeded a 12-month period. Therefore there is no value recognized in the financial statements as a result of this standard.

The Collaborative complies with GASB Statement No. 87 which requires right-of-use leased assets and related liabilities for all long-term leases. As of June 30, 2025, the Collaborative recognized right-of-use assets totaling \$4,011,146, net of accumulated amortization of \$1,516,777 and lease liabilities of \$2,776,971 for all leases. See Note D in the notes to the financial statements for additional information on the Collaborative's leases.

**BUDGETARY HIGHLIGHTS**

The Collaborative's annual budget for the fiscal year ended June 30, 2025 was approved by its Board of Directors and then amended on January 9, 2025. For the fiscal year ended June 30, 2025, the Collaborative received operating revenues, excluding on-behalf payments by the Massachusetts Teachers' and State Employees' Retirement Systems, of approximately \$27,266,000 compared to final budgeted revenues of approximately \$27,430,000. The difference between actual revenues received and budgeted revenues is primarily due to lower-than-expected revenues from state contracts. The Collaborative expended operating expenses, excluding on-behalf payments by the Massachusetts Teachers' and State Employees' Retirement Systems, of approximately \$24,804,000 compared to final budgeted expenses of approximately \$26,537,000. The difference between actual expenses incurred and budgeted expenses is primarily from increases relating to the hiring of additional staff that did not occur during the year as planned.

The Collaborative's annual budget for the fiscal year ended June 30, 2024 was approved by its Board of Directors and then amended on January 11, 2024. For the fiscal year ended June 30, 2024, the

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

Collaborative received operating revenues, excluding on-behalf payments by the Massachusetts Teachers' and State Employees' Retirement Systems, of approximately \$25,963,000 compared to final budgeted revenues of approximately \$24,805,000. The difference between actual revenues received and budgeted revenues is primarily due to higher-than-expected revenues from services the organization provides as well as state contracts. The Collaborative expended operating expenses, excluding on-behalf payments by the Massachusetts Teachers' and State Employees' Retirement Systems, of approximately \$23,198,000 compared to final budgeted expenses of approximately \$23,076,000. The difference between actual expenses incurred and budgeted expenses is primarily from increases relating to the hiring of additional staff.

**CONTACTING THE COLLABORATIVE**

This financial report is designed to provide readers of the financial statement an overview of the Collaborative's financial activities. If you have questions in regard to this report, contact Chris A. Scott, Ph.D., 11 Executive Park Drive, North Billerica, MA 01862, or at 978-528-7800.

**Valley Collaborative**  
Statement of Net Position  
June 30, 2025

**Assets**

|                                                             |                   |
|-------------------------------------------------------------|-------------------|
| Current Assets                                              |                   |
| Cash and cash equivalents                                   | \$ 7,896,935      |
| Accounts receivable, net                                    | 2,822,542         |
| Prepaid expenses and other assets                           | 44,286            |
| Total Current Assets                                        | <u>10,763,763</u> |
| Non-current Assets                                          |                   |
| Right-of-use leased assets, net of accumulated amortization | 2,494,371         |
| Capitalized assets, net                                     | 6,613,235         |
| Total Non-current Assets                                    | <u>9,107,606</u>  |
| Total Assets                                                | <u>19,871,369</u> |

**Deferred Outflows of Resources**

|                                                        |                             |
|--------------------------------------------------------|-----------------------------|
| Deferred Outflows of Resources Related to OPEB         | 947,666                     |
| <b>Total Assets and Deferred Outflows of Resources</b> | <b><u>\$ 20,819,035</u></b> |

**Liabilities, Deferred Inflows and Net Position**

|                                           |                  |
|-------------------------------------------|------------------|
| Current Liabilities                       |                  |
| Accounts payable and accrued liabilities  | \$ 1,098,008     |
| Deferred revenues                         | 500,000          |
| Credits due to member districts           | 4,947            |
| Lease liability, current portion          | 277,229          |
| Total Current Liabilities                 | <u>1,880,184</u> |
| Non-current Liabilities                   |                  |
| Lease liabilities, net of current portion | 2,499,742        |
| Net OPEB liability                        | 2,050,649        |
| Total Non-current Liabilities             | <u>4,550,391</u> |
| Total Liabilities                         | <u>6,430,575</u> |

**Deferred Inflows of Resources**

|                                               |                  |
|-----------------------------------------------|------------------|
| Deferred Inflows of Resources Related to OPEB | <u>2,724,696</u> |
|-----------------------------------------------|------------------|

**Net Position**

|                                                                    |                             |
|--------------------------------------------------------------------|-----------------------------|
| Net Position                                                       |                             |
| Unrestricted                                                       | 3,787,127                   |
| Restricted - contributions and other                               | 46,002                      |
| Restricted - capital reserve fund                                  | 1,500,000                   |
| Invested in right-of-use leased assets, net of related liabilities | (282,600)                   |
| Invested in capital assets, net of related debt                    | 6,613,235                   |
| Total Net Position                                                 | <u>11,663,764</u>           |
| <b>Total Liabilities, Deferred Inflows and Net Position</b>        | <b><u>\$ 20,819,035</u></b> |

**Valley Collaborative**  
Statement of Activities  
For the year ended June 30, 2025

| Functions/ Programs                            | Expenses             | Program Revenues        |                                                              | Net (Expense)<br>Revenue and<br>Changes in Net<br>Position |
|------------------------------------------------|----------------------|-------------------------|--------------------------------------------------------------|------------------------------------------------------------|
|                                                |                      | Charges for<br>Services | Adult Services<br>and Operating<br>Grants/Contrib-<br>utions |                                                            |
| <b>Governmental Activities:</b>                |                      |                         |                                                              |                                                            |
| Administration                                 | \$ 2,172,402         | \$ -                    | \$ -                                                         | \$ (2,172,402)                                             |
| Education                                      | 22,045,532           | 22,682,559              | 4,501,510                                                    | 5,138,537                                                  |
| Intergovernmental revenue and expense          | 3,365,600            | -                       | 3,365,600                                                    | -                                                          |
| Other postemployment benefits                  | 352,138              | -                       | -                                                            | (352,138)                                                  |
| Interest expense                               | 260,900              | -                       | -                                                            | (260,900)                                                  |
| Capital asset depreciation and<br>amortization | 909,123              | -                       | -                                                            | (909,123)                                                  |
| Right-of-use asset amortization                | 475,764              | -                       | -                                                            | (475,764)                                                  |
| <b>Total Governmental Activities</b>           | <b>\$ 29,581,459</b> | <b>\$ 22,682,559</b>    | <b>\$ 7,867,110</b>                                          | <b>\$ 968,210</b>                                          |
| <b>General Revenue and Other:</b>              |                      |                         |                                                              |                                                            |
| Interest                                       |                      |                         |                                                              | 54,508                                                     |
| Gain on disposal of assets                     |                      |                         |                                                              | 122,780                                                    |
| Other                                          |                      |                         |                                                              | 51,671                                                     |
| Credits to member districts                    |                      |                         |                                                              | (1,695,822)                                                |
| <b>Total General Revenue and Other</b>         |                      |                         |                                                              | <b>(1,466,863)</b>                                         |
| <b>Change in Net Position</b>                  |                      |                         |                                                              | <b>(498,653)</b>                                           |
| <b>Net Position, Beginning of Year</b>         |                      |                         |                                                              | <b>12,162,417</b>                                          |
| <b>Net Position, End of Year</b>               |                      |                         |                                                              | <b>\$ 11,663,764</b>                                       |

See accompanying notes to financial statements and independent auditor's report.



**Valley Collaborative**  
Balance Sheet  
Governmental Funds  
June 30, 2025

|                                            | <b>General Fund</b> | <b>Capital<br/>Reserve<br/>Fund</b> | <b>Nonmajor<br/>Governmental<br/>Funds</b> | <b>Total<br/>Governmental<br/>Funds</b> |
|--------------------------------------------|---------------------|-------------------------------------|--------------------------------------------|-----------------------------------------|
| <b>ASSETS</b>                              |                     |                                     |                                            |                                         |
| Cash and cash equivalents                  | \$ 6,350,933        | \$ 1,500,000                        | \$ 46,002                                  | \$ 7,896,935                            |
| Accounts receivable, net                   | 2,822,542           | -                                   | -                                          | 2,822,542                               |
| Prepaid expenses and other assets          | 44,286              | -                                   | -                                          | 44,286                                  |
| <b>Total Assets</b>                        | <b>\$ 9,217,761</b> | <b>\$ 1,500,000</b>                 | <b>\$ 46,002</b>                           | <b>\$ 10,763,763</b>                    |
| <b>LIABILITIES AND FUND BALANCES</b>       |                     |                                     |                                            |                                         |
| <b>Liabilities:</b>                        |                     |                                     |                                            |                                         |
| Accounts payable and accrued liabilities   | \$ 1,098,008        | \$ -                                | \$ -                                       | \$ 1,098,008                            |
| Deferred revenues                          | 500,000             | -                                   | -                                          | 500,000                                 |
| Credits due to member districts            | 4,947               | -                                   | -                                          | 4,947                                   |
| <b>Total Liabilities</b>                   | <b>1,602,955</b>    | <b>-</b>                            | <b>-</b>                                   | <b>1,602,955</b>                        |
| <b>Fund Balances:</b>                      |                     |                                     |                                            |                                         |
| Nonspendable                               | 44,286              | -                                   | -                                          | 44,286                                  |
| Restricted                                 | -                   | 1,500,000                           | 46,002                                     | 1,546,002                               |
| Committed                                  | -                   | -                                   | -                                          | -                                       |
| Assigned                                   | -                   | -                                   | -                                          | -                                       |
| Unassigned                                 | 7,570,520           | -                                   | -                                          | 7,570,520                               |
| <b>Total Fund Balances</b>                 | <b>7,614,806</b>    | <b>1,500,000</b>                    | <b>46,002</b>                              | <b>9,160,808</b>                        |
| <b>Total Liabilities and Fund Balances</b> | <b>\$ 9,217,761</b> | <b>\$ 1,500,000</b>                 | <b>\$ 46,002</b>                           | <b>\$ 10,763,763</b>                    |

**Valley Collaborative**  
Reconciliation of the Governmental Funds Balance Sheet to the Statement of Net Position  
June 30, 2025

|                                                |              |
|------------------------------------------------|--------------|
| <b>Total fund balances, governmental funds</b> | \$ 9,160,808 |
|------------------------------------------------|--------------|

Amounts reported for governmental activities in the Statement of Net Position are different because:

|                                                                                                                                                                                                                                                     |             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| Deferred inflows relating to the other postemployment benefit obligation is not a current obligation and therefore is not reported in this fund financial statement, but is reported in the government activities of the Statement of Net Position. | (2,724,696) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|

|                                                                                                                                                                       |           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| Right-of-use leased assets, net of accumulated amortization, used in governmental activities are not financial resources and therefore are not reported in the funds. | 2,494,371 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|

|                                                                                                                                                                                                                            |             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| Other postemployment benefit (OPEB) liability is not a current obligation and therefore is not reported in this fund financial statement, but is reported in the governmental activities of the Statement of Net Position. | (2,050,649) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|

|                                                                                                                                                                                  |             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| Long-term lease liabilities related to the right-of-use leased assets is used in governmental activities and are not financial uses and therefore are not reported in the funds. | (2,776,971) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|

|                                                                                                                                                                                                                                                              |         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| Deferred outflows relating to the other postemployment benefit obligation is not a current financial resource and therefore is not reported in this fund financial statement, but is reported in the government activities of the Statement of Net Position. | 947,666 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|

|                                                                                                                                                                                                                                                             |                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| Capital assets, net of related debt, used in governmental activities are not current financial resources and therefore are not reported in this fund financial statement, but are reported in the governmental activities of the Statement of Net Position. | <u>6,613,235</u> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|

|                                                |                             |
|------------------------------------------------|-----------------------------|
| <b>Net position of governmental activities</b> | <u><u>\$ 11,663,764</u></u> |
|------------------------------------------------|-----------------------------|

**Valley Collaborative**  
Statement of Revenues, Expenditures and Changes in Fund Balances  
Governmental Funds  
For the Year Ended June 30, 2025

|                                                | <b>General<br/>Fund</b> | <b>Capital<br/>Reserve<br/>Fund</b> | <b>Nonmajor<br/>Governmental<br/>Funds</b> | <b>Total<br/>Governmental<br/>Funds</b> |
|------------------------------------------------|-------------------------|-------------------------------------|--------------------------------------------|-----------------------------------------|
| <b>Revenues:</b>                               |                         |                                     |                                            |                                         |
| Tuition and service revenues                   | \$ 22,682,559           | \$ -                                | \$ -                                       | \$ 22,682,559                           |
| Adult services                                 | 4,477,614               | -                                   | -                                          | 4,477,614                               |
| Grants and contributions                       | -                       | -                                   | 23,896                                     | 23,896                                  |
| Intergovernmental revenue                      | 3,365,600               | -                                   | -                                          | 3,365,600                               |
| Interest                                       | 54,508                  | -                                   | -                                          | 54,508                                  |
| Other                                          | 51,671                  | -                                   | -                                          | 51,671                                  |
| Credits to member districts                    | (1,695,822)             | -                                   | -                                          | (1,695,822)                             |
| <b>Total Revenues</b>                          | <b>28,936,130</b>       | <b>-</b>                            | <b>23,896</b>                              | <b>28,960,026</b>                       |
| <b>Expenditures:</b>                           |                         |                                     |                                            |                                         |
| Administration                                 | 2,156,867               | -                                   | 15,535                                     | 2,172,402                               |
| Program payroll                                | 17,079,070              | -                                   | -                                          | 17,079,070                              |
| Program fringe benefits and payroll taxes      | 2,805,834               | -                                   | -                                          | 2,805,834                               |
| Professional and consulting fees               | 6,594                   | -                                   | -                                          | 6,594                                   |
| Transportation and travel                      | 188,630                 | -                                   | -                                          | 188,630                                 |
| Maintenance and other occupancy                | 597,767                 | -                                   | -                                          | 597,767                                 |
| Telephone, communications and utilities        | 232,881                 | -                                   | -                                          | 232,881                                 |
| Materials, supplies and equipment              | 703,389                 | -                                   | -                                          | 703,389                                 |
| Small business expenses                        | 189,063                 | -                                   | -                                          | 189,063                                 |
| Field trips                                    | 129,692                 | -                                   | -                                          | 129,692                                 |
| Training programs                              | 76,522                  | -                                   | -                                          | 76,522                                  |
| Other                                          | 36,090                  | -                                   | -                                          | 36,090                                  |
| Intergovernmental expense                      | 3,365,600               | -                                   | -                                          | 3,365,600                               |
| Capital outlay, net of debt incurred           | 791,751                 | -                                   | -                                          | 791,751                                 |
| Lease Service:                                 |                         |                                     |                                            |                                         |
| Lease interest                                 | 260,900                 | -                                   | -                                          | 260,900                                 |
| Lease financing principal                      | 340,848                 | -                                   | -                                          | 340,848                                 |
| <b>Total Expenditures</b>                      | <b>28,961,498</b>       | <b>-</b>                            | <b>15,535</b>                              | <b>28,977,033</b>                       |
| Excess (Deficit) of Revenues over Expenditures | (25,368)                | -                                   | 8,361                                      | (17,007)                                |
| <b>Other Financing Sources:</b>                |                         |                                     |                                            |                                         |
| Proceeds from capital asset sale               | 141,000                 | -                                   | -                                          | 141,000                                 |
| <b>Net Change in Fund Balances</b>             | <b>115,632</b>          | <b>-</b>                            | <b>8,361</b>                               | <b>123,993</b>                          |
| <b>Fund Balances, Beginning of Year</b>        | <b>7,499,174</b>        | <b>1,500,000</b>                    | <b>37,641</b>                              | <b>9,036,815</b>                        |
| <b>Fund Balances, End of Year</b>              | <b>\$ 7,614,806</b>     | <b>\$ 1,500,000</b>                 | <b>\$ 46,002</b>                           | <b>\$ 9,160,808</b>                     |

See accompanying notes to financial statements and independent auditor's report.

**Valley Collaborative**  
Reconciliation of the Statement of Revenues, Expenditures and Changes in Fund Balances of  
Governmental Funds to the Statement of Activities  
For the Year Ended June 30, 2025

**Net change in fund balances of total governmental funds** \$ 123,993

Amounts reported for governmental activities in the Statement of Activities are different because:

Governmental funds report outlays for capital assets and right-to-use leased assets as expenditures because such outlays use current financial resources. In contrast, the Statement of Activities reports only a portion of the outlay as expense. The outlay is allocated over the assets' estimated useful lives as depreciation or amortization expense for the period. Governmental funds do not report inflows from assets held to purchase capital assets or finance leased assets because such assets are not considered current financial resources. In contrast, the Statement of Activities does report the inflows as revenue.

|                                                |           |
|------------------------------------------------|-----------|
| Capital outlay purchases, net of debt incurred | 791,751   |
| Depreciation                                   | (909,123) |
| Amortization                                   | (475,764) |
| Gain on disposal of assets                     | 122,780   |

Governmental funds report lease financing payments as expenditures because such outlays use current financial resources. In contrast, the Statement of Activities reports only the current year interest accrued on the liability as expense.

|                           |         |
|---------------------------|---------|
| Lease financing principal | 340,848 |
|---------------------------|---------|

The change in accrual for other postemployment benefits reported in the Statement of Activities does not require the use of current financial resources and, therefore, is not reported as expenditures in the governmental funds.

|                                                            |                  |
|------------------------------------------------------------|------------------|
| Net change in other postemployment benefits (OPEB) accrual | <u>(352,138)</u> |
|------------------------------------------------------------|------------------|

|                                                          |                                   |
|----------------------------------------------------------|-----------------------------------|
| <b>Change in net position of governmental activities</b> | <b><u><u>\$ (498,653)</u></u></b> |
|----------------------------------------------------------|-----------------------------------|

**Valley Collaborative**  
Statement of Fiduciary Net Position  
Retirees' Health Insurance Trust Fund  
June 30, 2025

**Assets**

|              |                     |
|--------------|---------------------|
| Assets       |                     |
| Investments  | \$ 8,282,784        |
| Total Assets | <u>\$ 8,282,784</u> |

**Net Position**

|                                                           |                     |
|-----------------------------------------------------------|---------------------|
| Net Position                                              |                     |
| Net position held in trust for retirees' health insurance | \$ 8,282,784        |
| Total Net Position                                        | <u>\$ 8,282,784</u> |

**Valley Collaborative**  
Statement of Changes in Fiduciary Net Position  
Retirees' Health Insurance Trust Fund  
For the year ended June 30, 2025

|                                  |                            |
|----------------------------------|----------------------------|
| Additions:                       |                            |
| Contributions                    | \$ -                       |
| Investment gain                  | <u>933,532</u>             |
| Total Additions                  | <u>933,532</u>             |
| Deductions:                      |                            |
| Investment expenses              | <u>25,031</u>              |
| Total Deductions                 | <u>25,031</u>              |
| Change in Net Position           | <u>908,501</u>             |
| Net Position – Beginning of Year | <u>7,374,283</u>           |
| Net Position – End of Year       | <u><u>\$ 8,282,784</u></u> |

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

**Collaborative**

Valley Collaborative (The “Collaborative”) is an educational collaborative of the school districts of Billerica, Chelmsford, Dracut, Groton-Dunstable Regional, Nashoba Valley Technical, North Middlesex Regional, Tewksbury, Tyngsborough, and Westford. The Collaborative is a public entity under the jurisdiction of its member school committees, whose appointees comprise its board of directors. The Collaborative provides high quality academic, therapeutic and vocational services to individuals referred by local school districts and social service agencies.

**Basis of Presentation**

The Collaborative's financial statements are prepared in accordance with accounting principles generally accepted in the United States of America (“GAAP”). The Governmental Accounting Standards Board (“GASB”) is responsible for establishing GAAP for state and local governments through its pronouncements (Statements and Interpretations). The more significant accounting policies established in GAAP and used by the Collaborative are discussed below.

The Collaborative's basic financial statements include both government-wide (reporting the Collaborative as a whole) and fund financial statements (reporting the Collaborative's major funds). Both the government-wide and fund financial statements categorize primary activities as either governmental or business type. Governmental activities are generally financed through intergovernmental assessments or other non-exchange transactions. The Collaborative does not have any activities classified as business type activities.

**Government-wide Statements**

In the government-wide Statement of Net Position, governmental columns are presented on a consolidated basis and are reported on a full accrual, economic resource basis, which recognizes all long-term assets, receivables and deferred outflows of resources, as well as long-term liabilities, deferred inflows of resources and other liabilities reported on a full accrual basis. The Collaborative’s net position is reported in three parts—net investment in capital assets; restricted; and unrestricted. The Collaborative first utilizes restricted resources to finance qualifying activities.

The government-wide Statement of Activities demonstrates the degree to which the direct expenses of a given function or segment are offset by program revenues. Direct expenses are those that are clearly identifiable with a specific function or segment. The Collaborative does allocate indirect expenses to functions in the Statement of Activities if there is a reasonable basis for doing so. Depreciation is reported as one amount, in total, on the Statement of Activities, and is not allocated among the respective functions.

The government-wide focus is more on the sustainability of the Collaborative as an entity and the change in the Collaborative’s net position resulting from the current year’s activities.

**Fund Financial Statements**

The financial transactions of the Collaborative are reported in individual funds in the fund financial statements. Each fund is accounted for by providing a separate set of self-balancing accounts that comprises its assets, liabilities, reserves, fund equity, revenues and expenditures/expenses. The various funds are reported by generic classification within the financial statements.

The emphasis in fund financial statements is on the major funds in either the governmental or business-type activities categories. GASB pronouncements set forth minimum criteria (percentage of the assets and deferred outflows of resources, liabilities and deferred inflows of resources, revenues or expenditures/expenses of either fund category or the governmental and enterprise combined) for the determination of major funds. The Collaborative may electively add funds, as major funds, which have specific community focus. The nonmajor funds are combined in a column in the fund financial statements.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – *continued***

The following governmental fund types are used by the Collaborative - the Collaborative does not use proprietary funds:

**Governmental Funds:**

The focus of the governmental funds' measurement (in the fund statements) is upon determination of financial position and changes in financial position (sources, uses, and balances of financial resources) rather than upon net income. The following is a description of the governmental funds of the Collaborative:

*General fund* - is the general operating fund of the Collaborative. It is used to account for all financial resources not accounted for and reported in another fund.

*Capital reserve fund* - used to account for and report financial resources that are restricted, committed, or assigned to be used for the acquisition, construction, or renovation of major capital facilities or equipment.

*Non-major governmental funds* - consist of other special revenue and permanent funds that are aggregated and presented in the non-major governmental funds column on the government funds financial statements.

**Fiduciary Funds:**

Fiduciary Funds are used to report assets held in a trustee or agency capacity for others and therefore are not available to support Collaborative programs. The reporting focus is on net position and changes in net position presented in fiduciary fund financial statements. Since by definition these assets are being held for the benefit of a third party (retirees) and cannot be used to address activities or obligations of the government, these funds are not incorporated into the government-wide statements.

**Measurement Focus and Basis of Accounting**

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

Governmental fund financial statements are reported using the flow of current financial resources measurement focus and the modified accrual basis of accounting. Under the modified accrual basis of accounting, revenues are recognized when susceptible to accrual (i.e., measurable and available). Measurable means the amount of the transaction can be determined and available means collectible within the current period or soon enough thereafter to pay liabilities of the current period. Expenditures are recorded when the related fund liability is incurred, except for unmatured interest on general long-term debt which is recognized when due, and certain compensated absences, claims and judgments which are recognized when the obligations are expected to be liquidated with current expendable available resources.

**Cash and Cash Equivalents**

The Collaborative considers all highly liquid investments with a maturity of three months or less when purchased to be cash equivalents. The Collaborative maintains its uncollateralized cash balances in two financial institutions. The balances in one of the financial institutions are insured by the Federal Deposit Insurance Company up to \$250,000. From time to time, the Collaborative maintains bank account balances in excess of the federally insured limits. The Collaborative also maintains cash and cash equivalents at the Massachusetts Municipal Depository Trust which is collateralized by its underlying assets. At June 30, 2025, the Collaborative's uninsured cash balances, including reconciling items, totaled \$7,646,935. The Collaborative monitors its exposure associated with cash and cash equivalents and has not experienced any losses in such accounts.



**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – *continued***

**Fair Value Measurements and Investments**

The Collaborative has contributed \$4,854,654 to a public employee retirement trust account with Public Agency Retirement Services as trustee, on behalf of its retirees' health insurance trust fund. The trustee invests the funds in Vanguard mutual funds. As of June 30, 2025, the balance in these investments consisted of the following:

|              | <u>Cost</u> | <u>Fair<br/>Value</u> | <u>Unrealized<br/>Gain</u> |
|--------------|-------------|-----------------------|----------------------------|
| Mutual Funds | \$4,854,654 | \$8,282,784           | \$3,428,130                |

All investments of the Collaborative are measured at fair value, generally based on quoted market prices in accordance with level 1 of the Fair Value Hierarchy established under GASB Statement No. 72, *Fair Value Measurement and Application*.

Net increase in the fair value on investments for the year ended June 30, 2025 was \$908,501. There were no realized gains or losses during the year ended June 30, 2025. Investment fees for the year ended June 30, 2025 were \$25,031.

The Collaborative manages its investments in accordance with state public finance laws that require that all moneys held in the name of the Collaborative, which are not required to be kept liquid for purposes of distribution, shall be invested in such a manner as to require the payment of interest on the money at the highest possible rate reasonably available, taking account of safety, liquidity and yield. The Collaborative has directed a local investment management service to manage the funds as conservatively as possible. However, the investments are still subject to market risk of loss. For an investment, custodial credit risk is the risk that, in the event of the failure of the counterparty, the Collaborative will not be able to recover the value of its investments or collateral securities that are in possession of an outside party. The Collaborative's investments are uninsured, not registered in the name of the Collaborative, and held by the counterparty's trust department or agent but not in the Collaborative's name.

**Operating Revenues and Expenses**

Operating revenues consist primarily of billings to member municipalities or other cities and towns for providing programs and services. The Collaborative also receives approximately 17% of its revenues under social service contracts issued by agencies of the Commonwealth of Massachusetts, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments. Operating expenses include educational costs, administrative expenses and depreciation on capital assets.

**Accounts Receivable**

Accounts receivable consists of all revenues earned at year end and not yet collected. Major receivable balances include tuitions and certain related charges. The Collaborative records its bad debts using the allowance method. As of June 30, 2025, there was an allowance for doubtful accounts of \$27,574.

**Credits Due to Member Districts**

"Credits due to member districts" represent member district credits issued during the fiscal year but not utilized by the district during the fiscal year. The credits are to be applied against future Collaborative invoices or disbursed to the member district and are not considered an agency fund of the Collaborative.

**Property and Equipment**

Property and equipment are capitalized at historical cost. Depreciation is computed on the straight-line method using estimated useful lives of two to five years for websites, computer equipment, furniture, fixtures, vehicles and program equipment and five to ten years for leasehold improvements. The Collaborative has purchased and renovated a building. The building and renovations are depreciated using estimated useful lives of 40 and 20 years, respectively.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – *continued***

**Equity Classifications**

**Government-wide Statements**

Equity is classified as net position and displayed in three components:

*Invested in capital assets, net of related debt* - this component of net position consists of capital assets, net of accumulated depreciation, reduced by the outstanding balances of bonds, notes or other borrowings that are attributable to the acquisition, construction, or improvement of those assets. Deferred outflows of resources and deferred inflows of resources that are attributable to the acquisition, construction, or improvement of those assets or related debt are also included in this component of net position.

*Invested in right-of-use assets, net of liabilities* – this component of net position consists of right-of-use assets, net of accumulated amortization, reduced by the outstanding balances of liabilities that are attributable to the leased assets.

*Restricted* - this component of net position consists of restricted net assets reduced by liabilities and deferred inflows or resources related to those assets. These assets may be restricted by constraints placed on the use either by (1) external groups such as creditors, grantors, contributors, or laws or regulations of other governments; or (2) law through constitutional provisions or enabling legislation.

*Unrestricted* - this component of net position is the net amount of the assets, deferred outflows of resources, liabilities, and deferred inflows of resources that are not included in the determination of net investment in capital assets or the restricted component of net position.

**Fund Financial Statements**

Governmental fund equity is classified as fund balance. Fund balance is further classified based on the extent to which the government is bound to honor constraints on specific purposes for which amounts in the funds can be spent. Fund balances can be classified in the following components:

*Nonspendable fund balance* – consists of amounts that cannot be spent because they are either (a) not in spendable form or (b) legally or contractually required to be maintained intact.

*Restricted fund balance* – consists of amounts upon which constraints have been placed on their use whether (a) externally imposed by creditors (such as through debt covenants), grantors, contributors, or laws or regulations of other governments; (b) imposed by law through constitutional provisions or enabling legislation.

*Committed fund balance* – consists of amounts which can only be used for specific purposes pursuant to constraints imposed by the Collaborative's highest level of decision making, the Board of Directors. Any modification or rescission must also be made by a vote of the Board of Directors.

*Assigned fund balance* – consists of amounts that are constrained by the Collaborative's intent to be used for specific purposes. Intent is expressed by (a) the governing body itself, or (b) a Board of Directors, or official to which the governing body has delegated the authority to assign amounts to be used for specific purposes.

*Unassigned fund balance* – consists of the residual classification for the remaining fund balance. It represents amounts that have not been assigned to other funds and has not been restricted, committed, or assigned to specific purposes.

**Use of Estimates**

Management uses estimates and assumptions in preparing financial statements in accordance with generally accepted accounting principles. Those estimates and assumptions affect the reported amounts of assets and liabilities, and reported revenues and expenses. Actual results could vary from the estimates used.

**Subsequent Events**

Subsequent events have been evaluated through November 20, 2025, which is the date the financial statements were available to be issued.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE B – ACCOUNTS RECEIVABLE**

Accounts receivable consisted of the following as of June 30, 2025:

|                                   |                     |
|-----------------------------------|---------------------|
| Tuition and services to districts | \$ 2,331,944        |
| State contracts                   | <u>518,172</u>      |
|                                   | 2,850,116           |
| Allowance for doubtful accounts   | <u>(27,574)</u>     |
|                                   | <u>\$ 2,822,542</u> |

The Collaborative has established an allowance for doubtful accounts in the amount of \$27,574. The allowance is based on specific identification of probable losses and an estimate of additional losses based on historical experience. Account balances are charged off against the allowance when it is probable the receivable will not be recovered. For the year ended June 30, 2025, the Collaborative recorded no bad debt expense.

**NOTE C – CAPITAL ASSETS**

A summary of depreciable capital assets follows:

|                                 | <u>Buildings &amp;<br/>Improvements</u> | <u>Furniture,<br/>Equipment &amp;<br/>Software</u> | <u>Vehicles</u>    | <u>Total</u>        |
|---------------------------------|-----------------------------------------|----------------------------------------------------|--------------------|---------------------|
| <u>COST</u>                     |                                         |                                                    |                    |                     |
| Balance, July 1, 2024           | \$9,318,041                             | \$ 1,462,400                                       | \$1,858,476        | \$12,638,917        |
| Additions                       | -                                       | 84,880                                             | 706,871            | 791,751             |
| Disposals                       | <u>-</u>                                | <u>-</u>                                           | <u>(279,117)</u>   | <u>(279,117)</u>    |
|                                 | 9,318,041                               | 1,547,280                                          | 2,286,230          | 13,151,551          |
| <u>ACCUMULATED DEPRECIATION</u> |                                         |                                                    |                    |                     |
| Balance, July 1, 2025           | (4,095,631)                             | (1,275,022)                                        | (1,196,937)        | (6,567,590)         |
| Additions                       | (509,318)                               | (84,869)                                           | (314,936)          | (909,123)           |
| Disposals                       | <u>-</u>                                | <u>-</u>                                           | <u>260,897</u>     | <u>260,897</u>      |
|                                 | (4,604,949)                             | (1,359,891)                                        | (1,250,976)        | (7,215,816)         |
| Net, June 30, 2025              | <u>\$ 4,713,092</u>                     | <u>\$ 187,389</u>                                  | <u>\$1,035,254</u> | <u>\$ 5,935,735</u> |

Land in the amount of \$677,500 is not being depreciated. In fiscal 2025, the Collaborative capitalized \$706,871 for vehicles, and \$84,880 for office furniture and equipment. The Collaborative traded in various fully depreciated vehicles during the year ended June 30, 2025, and received \$141,000 of trade-in value toward the purchase of the new vehicles. Depreciation expense of \$909,123 was not allocated to governmental functions. It appears unallocated on the Statement of Activities. The capital reserve for future capital purchases is fully funded.

**NOTE D –LEASE OBLIGATIONS**

The Collaborative leases various classroom and office spaces and office equipment under operating leases. All of its leases qualifying as long-term leases are recorded in accordance with GASB Statement No. 87.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE D –LEASE OBLIGATIONS – *continued***

During fiscal 2017, the Collaborative entered into a building lease for program use at 135 Coburn Road in Tyngsborough, Massachusetts, commencing July 1, 2016 through June 30, 2033 including extensions. The lease requires quarterly rent payments of \$63,988 through June 2028, then it is adjusted to \$31,250 through June 2030, and finally adjusted to \$94,181 through June 2033. During fiscal 2019, the Collaborative entered into a building lease for program and administrative use at 25 Linnell Circle in Billerica, Massachusetts, commencing July 1, 2018 through June 30, 2025 including extension. The lease requires monthly payments of \$13,187 through June 2023, then it is adjusted to \$13,583 through June 2024, and finally adjusted to \$13,991 through June 2025. The lease was not renewed when it expired. During fiscal 2022, the Collaborative entered into a building lease for program use at 11 Executive Park Drive in Billerica, Massachusetts, commencing June 1, 2022 through August 31, 2032. The monthly payments are increased annually by approximately 2% of the prior year. The Coburn Road, Linnell Circle and Executive Park Drive leases represent the total of the right-of-use lease assets and liabilities. Right-of-use assets and initial liabilities are valued using a rate of 6% which represents the Collaborative's incremental borrowing rates at the time the leases and extension were entered into, respectively.

Lease agreements, including modifications, are summarized as follows:

| Description             | Date     | Payment Terms | Payment Amount   | Interest Rate | Total Lease Asset/Liability | Accum. Amort.<br>6/30/2025 | Net Asset<br>6/30/2025 | Liability Balance<br>6/30/2025 |
|-------------------------|----------|---------------|------------------|---------------|-----------------------------|----------------------------|------------------------|--------------------------------|
| 135 Coburn Road**       | 7/1/2016 | 17 years      | \$255,950 (FY25) | 6.00%         | \$2,133,409                 | \$ 638,464                 | \$1,494,945            | \$1,654,281                    |
| 25 Linnell Circle       | 7/1/2022 | 3 years       | \$167,887 (FY25) | 6.00%         | 448,324                     | 448,324                    | -                      | -                              |
| 11 Executive Park Drive | 6/1/2022 | 9.25 years    | \$177,910 (FY25) | 6.00%         | 1,429,413                   | 429,987                    | 999,426                | 1,122,690                      |
| Total Lease Agreements  |          |               |                  |               | \$4,011,146                 | \$1,516,777                | \$2,494,371            | \$2,776,971                    |

\*\*Lease was modified during FY2022.

Annual requirements to amortize long-term obligations and related interest are as follows:

| Year Ending<br>30-Jun | Principal   | Interest  | Total       |
|-----------------------|-------------|-----------|-------------|
| 2026                  | \$277,229   | \$160,361 | \$437,590   |
| 2027                  | 298,285     | 143,155   | 441,440     |
| 2028                  | 320,764     | 124,646   | 445,410     |
| 2029                  | 210,811     | 107,739   | 318,550     |
| 2030                  | 228,140     | 94,620    | 322,760     |
| Thereafter            | 1,441,742   | 132,180   | 1,573,922   |
|                       | \$2,776,971 | \$762,701 | \$3,539,672 |

For the year ended June 30, 2025, total amortization expense of leased assets was \$475,764 and total interest expense on lease liabilities was \$260,900.

**NOTE E – MASSACHUSETTS TEACHERS' AND STATE EMPLOYEES' RETIREE SYSTEMS**

Plan Descriptions:

The Collaborative's employees participate in the Massachusetts Teachers' (MTRS) or State Employee' Retirement System (MSERS), statewide cost-sharing multi-employer defined benefit plans public employee retirement systems (PERS) covering all employees of local school districts within the Commonwealth of Massachusetts. The retirement systems issue publicly available annual reports that includes financial statements and required supplementary information, which may be obtained by writing to Public Employee Retirement Administration Commission (PERAC), 5 Middlesex Avenue, Suite 304, Somerville, Massachusetts, 02145.

**NOTE E – MASSACHUSETTS TEACHERS’ AND STATE EMPLOYEES’ RETIREE SYSTEMS –  
*continued***

Benefits Provided:

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

Members become vested after ten years of creditable service. A superannuation retirement allowance may be received upon the completion of twenty years of creditable service or upon reaching the age of 55 with ten years of service. Normal retirement for most employees occurs at age 65; for certain hazardous duty and public safety positions, normal retirement is at age 55. Most employees who joined the system after April 1, 2012 cannot retire prior to age 60.

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

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

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

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

Contributions:

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

| <u>Hire Date</u>         | <u>% of Compensation</u>                                       |
|--------------------------|----------------------------------------------------------------|
| Prior to 1975.....       | 5% of regular compensation                                     |
| 1975 - 1983.....         | 7% of regular compensation                                     |
| 1984 to 6/30/1996.....   | 8% of regular compensation                                     |
| 7/1/1996 to present..... | 9% of regular compensation                                     |
| 1979 to present.....     | An additional 2% of regular compensation in excess of \$30,000 |

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE E – MASSACHUSETTS TEACHERS’ AND STATE EMPLOYEES’ RETIREE SYSTEMS –  
*continued***

Educational collaboratives contribute amounts equal to the normal cost of employees’ benefits participating in MSERS at a rate established by the Public Employees’ Retirement Administration Commission (PERAC), currently 6.1% of covered payroll. Legally, the collaboratives are only responsible for contributing the annual normal cost of their employees’ benefits (i.e., the present value of the benefits earned by those employees in any given year) and are not legally responsible for the past service cost attributable to those employees or previously retired employees of the collaboratives. During fiscal year 2025, the Collaborative’s contributions on behalf of employees totaled \$533,714.

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

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

The Commonwealth is a nonemployer contributor in MTRS and is required by statute to make all actuarially determined employer contributions on behalf of the member employers participating in MTRS. Therefore, the Collaborative is considered to be in a 100% special funding situation as defined by GASB Statement No. 68, *Accounting and Financial Reporting for Pensions* and the Commonwealth is a nonemployer contributing entity in under both MSERS and MTRS. Since the employers do not contribute directly to each system beyond the MSERS annual normal cost, there is no net pension liability to recognize. However, the notes to the financial statements must disclose the portion of the nonemployer contributing entities’ share of the collective net pension liability that is associated with the employer. In addition, the Collaborative must recognize its portion of the collective pension expense as both a revenue and pension expense.

The nonemployer contributing entities’ share of the collective net pension liability that is associated with the Collaborative was measured as of June 30, 2024 and was \$15,733,379 and \$21,098,472 under MSERS and MTRS, respectively. In fiscal 2025, the Collaborative recognized revenue and related expense of \$1,624,098 (under GASB Statement No. 68) for its portion of the collective pension expense under MSERS. In fiscal 2025, the Collaborative recognized revenue and related expense of \$1,741,502 (under GASB Statement No. 68), for its portion of the collective pension expense under MTRS. These amounts are recorded as Intergovernmental revenue and expense in the financial statements.

**NOTE F – COMPENSATED ABSENCES**

The Collaborative allows eligible employees to carryover unused vacation time up to 10 days per year and to accrue a maximum of 20 days total. At the end of the fiscal year, any unused vacation time in excess of the above amounts is forfeited. The Collaborative’s vacation accrual for the year ended June 30, 2025 was \$122,982.

**NOTE G – RISK MANAGEMENT**

The Collaborative is exposed to various risks of loss relating to torts, theft or damage of, and destruction of assets; error and omissions; injuries to employees; and natural disasters. The Collaborative has obtained a variety of commercial liability insurance policies that pass the risk of loss listed above to independent third parties. Management believes such coverage is sufficient to preclude any significant uninsured losses to the Collaborative. Settled claims have not exceeded the insurance coverage in any of the past three fiscal years.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE G – RISK MANAGEMENT – *continued***

The Collaborative offers eligible participants access to various health and life insurance. Payment, in the form of premiums, is generally made monthly. The payments are funded in part from the Collaborative and payroll withholdings from active employee participants or direct payments from certain other eligible participants. In general, the Collaborative pays 75-80% of the cost of health insurance and 100% of the cost of life insurance for those participants that qualify.

**NOTE H – COMMITMENTS AND CONTINGENCIES**

The Collaborative participates in state and federal contracts, which are governed by various rules and regulations of the agencies. Costs charged to the respective programs are subject to audit and adjustment by agencies; therefore, to the extent that the Collaborative has not complied with the rules and regulations governing the refunds of any money received may be required and the collectability of any related receivable at June 30, 2025 may be impaired. In the opinion of the Collaborative, there are no significant contingent liabilities relating to compliance with the rules and regulations governing the respective contracts; therefore, no provision has been recorded in the accompanying financial statements for such contingencies.

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN**

The Collaborative follows the provisions of GASB Statement No. 75, “Accounting and Financial Reporting for Postemployment Benefits other than Pensions.”

Description

At the board meeting on June 18, 2015, the Collaborative’s board members implemented a postemployment health care plan and voted to create a trust fund for related retiree health benefits to take effect July 1, 2015. The trust fund is held for the benefit of a third party (retiree health insurance participants) and cannot be used to address activities or obligations of the Collaborative, therefore these funds are not incorporated into the government-wide financial statements. All funds of the trust are held at Public Agency Retirement Services and are held in mutual funds. The trust is irrevocable and is exempt from federal and state income taxes under Internal Revenue Code Section 115. The sole purpose of the trust is to provide funds to pay postemployment healthcare benefits to qualified retirees. The plan has the retirees pay for 20% of the premiums for the medical insurance. As a result of establishing the trust, the Collaborative’s board members voted to initially transfer \$3,150,000 to fund the trust. During the fiscal year ended June 30, 2025 the Collaborative did not transfer any additional funds to the trust. The Collaborative has transferred \$4,854,654 to date to the trust account.

An employee hired before April 2, 2012 shall become eligible to retire under these programs upon meeting the following conditions:

- i. Completion of 10 years of creditable service at the Collaborative
- ii. And attainment of age 55 as an active member
- iii. Or completion of 20 years of service at the Collaborative, regardless of age

An employee hired after April 2, 2012 shall become eligible to retire under these programs upon meeting the following conditions:

- i. Completion of 10 years of creditable service at the Collaborative
- ii. And attainment of age 60 as an active member

Funding Policy

The contribution requirements of plan members and the Collaborative are established and may be amended through Collaborative ordinances. For the period ending on the June 30, 2025 Measurement Date, total Collaborative premiums plus implicit costs for the retiree medical program were \$109,715. The Collaborative also contributed \$0 to the OPEB Trust for a total contribution during the measurement period of \$109,715 to be reported in the financial statements for the fiscal year ending June 30, 2025.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN – *continued***

Investment Policy

The long-term rate of return on assets developed based on the Collaborative Investment Policy is 5.86%. The rate is comprised of a 3.73% real rate of return and 2.50% inflation assumption, net of 0.37% investment expense.

Actuarially Determined Contribution (ADC)

The Collaborative's Actuarially Determined Contribution (ADC) is an amount actuarially determined in accordance with the parameters of GASB Statement No. 74/75 which is composed of the service cost and an amortization of the unfunded liability. For FY2025 and future years a 30-year amortization increasing by 3.00% per year of the Collaborative's unfunded liability for the purpose of calculating ADC. The following table shows the components of the Collaborative's annual ADC for the fiscal year and the amount actually contributed to the plan:

| <b>Actuarially Determined Contribution - Deficiency / (Excess)</b>       |  | <b>June 30, 2025</b> |
|--------------------------------------------------------------------------|--|----------------------|
| I. Service Cost                                                          |  | \$ 802,329           |
| II. 30-year level dollar amortization of NOL                             |  | 91,555               |
| III. Actuarial Determined Contribution [I. + II.]                        |  | 893,884              |
| IV. Contributions in relation to the actuarially determined contribution |  | (109,715)            |
| V. Contribution deficiency / (excess) [III. + IV.]                       |  | <u>\$ 784,169</u>    |
| Covered employee payroll                                                 |  | \$17,432,244         |
| Contribution as a % of covered employee payroll                          |  | 0.63%                |
| Discount Rate                                                            |  | 5.22%                |
| Money Weighted Rate of Return                                            |  | 12.32%               |

OPEB Liability and OPEB Expense

|                                                                                 | <b>Fiscal Year Ended June 30, 2025</b>              |                   |
|---------------------------------------------------------------------------------|-----------------------------------------------------|-------------------|
|                                                                                 | <b>Collaborative<br/>Employees and<br/>Retirees</b> | <b>Total</b>      |
| I. Total OPEB Liability as of June 30, 2023                                     | \$10,333,433                                        | \$10,333,433      |
| II. Fiduciary Net Position as of June 30, 2023                                  | <u>8,282,784</u>                                    | <u>8,282,784</u>  |
| III. Net OPEB Liability (Asset) as of June 30, 2023 [I.-II.]                    | 2,050,649                                           | 2,050,649         |
| IV. Service Cost                                                                | 802,329                                             | 802,329           |
| V. Interest on Total OPEB Liability (Asset), Service Cost, and Benefit Payments | 512,464                                             | 512,464           |
| VI. Projected Earnings on OPEB Plan Investments                                 | (456,799)                                           | (456,799)         |
| VII. Net Recognition of Deferred (Inflows)/Outflows                             | <u>(396,141)</u>                                    | <u>(396,141)</u>  |
| VIII. Financial Statement Expense [IV.+V.+VI.+VII.]                             | 461,853                                             | 461,853           |
| IX. Employer Share of Costs                                                     | (109,715)                                           | (109,715)         |
| X. Employer (Payments) Withdrawals to/from OPEB Trust                           | -                                                   | -                 |
| XI. Total Employer Contribution [IX.+X.]                                        | <u>( 109,715)</u>                                   | <u>( 109,715)</u> |
| XII. Net OPEB Expense [VIII.+XI.]                                               | <u>\$ 352,138</u>                                   | <u>\$ 352,138</u> |

Effect of 1% Change in Healthcare Trend

In the event that healthcare trend rates were 1% higher than forecast and employee contributions were to increase at the forecast rates, the Total OPEB Liability as of the June 30, 2025 Measurement Date would increase to \$15,259,430 and Net OPEB Liability would increase to \$4,925,997. If such healthcare trend rates were 1% less than forecast and employee contributions were to increase at the forecast rate, the Total OPEB Liability would decrease to \$10,281,060 and the Net OPEB Liability would decrease to (\$52,373).



**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN – *continued***

Effect of 1% Change in Discount Rates

As of the June 30, 2025 Measurement Date, if the discount rate were 1% higher than what was used in this valuation, the Total OPEB Liability would decrease to \$10,053,613 and the Net OPEB Liability would decrease to \$279,820. If the discount rate were 1% lower than was used in this valuation, the Total OPEB Liability would increase to \$14,680,045 and the Net OPEB Liability would increase to \$4,346,612.

Actuarial Methods and Assumptions

Projections of benefits for financial reporting purposes are based on the substantive plan (the plan as understood by the employer and plan members) and include the types of benefits provided at the time of each valuation and the historical pattern of sharing of benefits costs between the employer and plan members to that point. The actuarial methods and assumptions used include techniques that are designed to reduce the effects of short-term volatility in actuarial accrued liabilities and the actuarial value of assets, consistent with the long-term perspective of the calculations.

|                                |                                    |
|--------------------------------|------------------------------------|
| Actuarial Cost Method:         | Individual Entry Age Normal        |
| Discount Rate:                 | 5.22% per annum (previously 5.45%) |
| General Inflation Assumption:  | 2.50% per annum                    |
| Annual Compensation Increases: | 3.00% per annum                    |
| Actuarial Value of Assets:     | Market Value                       |

Recognition of OPEB Trust Assets

The state of Massachusetts has passed legislation allowing municipal entities to establish a Trust for Other Postemployment Benefits (“OPEB”) under M.G.L. Chapter 32B, Section 20 for purposes of accumulating assets to pre-fund the liabilities under GASB 75. This legislation was amended effective November 9, 2016 to clarify who may adopt such a Trust and provide guidance on the ongoing operation of such a Trust. The Collaborative has established an irrevocable trust for the purposes of prefunding liabilities under GASB 74/75.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN – *continued***

Changes in Net OPEB Liability

| <b>Changes in Net OPEB Liability</b>                                       |                                 |                                            |                               |
|----------------------------------------------------------------------------|---------------------------------|--------------------------------------------|-------------------------------|
|                                                                            | <b>Increase (Decrease)</b>      |                                            |                               |
|                                                                            | <b>Total OPEB<br/>Liability</b> | <b>Plan<br/>Fiduciary Net<br/>Position</b> | <b>Net OPEB<br/>Liability</b> |
| <b>I. Balances at June 30, 2024</b>                                        | \$ 8,654,814                    | \$ 7,374,283                               | \$ 1,280,531                  |
| <b>II. Prior Period Adjustment</b>                                         | -                               | -                                          | -                             |
| <b>III. Balances for June 30, 2024 with Adjustment [I.+II.]</b>            | 8,654,814                       | 7,374,283                                  | 1,280,531                     |
| <b>Changes for the year:</b>                                               |                                 |                                            |                               |
| IV. Service Cost                                                           | 802,329                         | -                                          | 802,329                       |
| V. Interest on Total OPEB Liability, Service Cost, and<br>Benefit Payments | 512,464                         | -                                          | 512,464                       |
| VI. Changes in Benefit Terms*                                              | -                               | -                                          | -                             |
| VII. Changes in assumptions**                                              | 90,322                          | -                                          | 90,322                        |
| VIII. Differences between actual and expected<br>experience**              | 383,219                         | -                                          | 383,219                       |
| IX. Net Investment Income                                                  | -                               | 908,501                                    | (908,501)                     |
| X. Employer Contributions (Withdrawals) to/from Trust                      | -                               | 109,715                                    | (109,715)                     |
| XI. Benefit payments withdrawn from Trust                                  | -                               | (109,715)                                  | 109,715                       |
| XII. Benefit payments excluding Implicit Cost                              | (85,145)                        | -                                          | (85,145)                      |
| XIII. Implicit Cost Amount                                                 | (24,570)                        | -                                          | (24,570)                      |
| XIV. Total Benefit payments including Implicit Cost<br>[XII.+XIII.]        | (109,715)                       | -                                          | (109,715)                     |
| XV. Administrative and Other Charges                                       | -                               | -                                          | -                             |
| XVI. Other Charges                                                         | -                               | -                                          | -                             |
| <b>XVII. Net Changes</b>                                                   |                                 |                                            |                               |
| <b>[IV.+V.+VI.+VII.+VIII.+IX.+X.+XI.+XIV.+XV.+XVI.]</b>                    | \$ 1,678,619                    | \$ 908,501                                 | \$ 770,118                    |
| <b>XVI. Balances at June 30, 2025 [III.+XVII.]</b>                         | \$ 10,333,433                   | \$ 8,282,784                               | \$ 2,050,649                  |

\* Recognized immediately

Deferred Inflows/Outflows

| <b>Deferred (Inflows)/Outflows in OPEB Expense arising from the recognition of the effects of differences between expected &amp; actual experience</b> |                                                                         |                                           |                              |             |             |             |             |             |             |                         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|-------------------------------------------|------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------------------|
| <b>Fiscal</b>                                                                                                                                          | <b>Differences<br/>between actual<br/>&amp; expected<br/>experience</b> | <b>Recognition<br/>Period<br/>(years)</b> | <b>Remaining<br/>Balance</b> | <b>2025</b> | <b>2026</b> | <b>2027</b> | <b>2028</b> | <b>2029</b> | <b>2030</b> | <b>There-<br/>after</b> |
| 2019                                                                                                                                                   | (1,703,175)                                                             | 7.00                                      | -                            | (243,309)   | -           | -           | -           | -           | -           | -                       |
| 2020                                                                                                                                                   | (469)                                                                   | 7.00                                      | (67)                         | (67)        | (67)        | -           | -           | -           | -           | -                       |
| 2021                                                                                                                                                   | (1,125,612)                                                             | 7.00                                      | (321,602)                    | (160,802)   | (160,802)   | (160,800)   | -           | -           | -           | -                       |
| 2022                                                                                                                                                   | -                                                                       | 7.00                                      | -                            | -           | -           | -           | -           | -           | -           | -                       |
| 2023                                                                                                                                                   | (1,278,180)                                                             | 7.00                                      | (730,389)                    | (182,597)   | (182,597)   | (182,597)   | (182,597)   | (182,598)   | -           | -                       |
| 2024                                                                                                                                                   | -                                                                       | 7.00                                      | -                            | -           | -           | -           | -           | -           | -           | -                       |
| 2025                                                                                                                                                   | 383,219                                                                 | 7.00                                      | 328,474                      | 54,745      | 54,745      | 54,745      | 54,745      | 54,745      | 54,745      | 54,749                  |
| Total Remaining Balance                                                                                                                                |                                                                         |                                           | (723,584)                    |             |             |             |             |             |             |                         |
| Net increase (decrease) in OPEB Expense                                                                                                                |                                                                         |                                           |                              | (532,030)   | (288,721)   | (288,652)   | (127,852)   | (127,853)   | 54,745      | 54,749                  |

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN – continued**

| Deferred (Inflows)/Outflows in OPEB Expense arising from the recognition of the effects of changes in assumptions |                                                  |                            |                   |           |           |           |           |           |           |             |
|-------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|----------------------------|-------------------|-----------|-----------|-----------|-----------|-----------|-----------|-------------|
| Fiscal                                                                                                            | Differences between actual & expected experience | Recognition Period (years) | Remaining Balance | 2025      | 2026      | 2027      | 2028      | 2029      | 2030      | There-after |
| 2019                                                                                                              | 2,659,477                                        | 7.00                       | -                 | 379,927   | -         | -         | -         | -         | -         | -           |
| 2020                                                                                                              | -                                                | 7.00                       | -                 | -         | -         | -         | -         | -         | -         | -           |
| 2021                                                                                                              | 467,416                                          | 7.00                       | 133,546           | 66,774    | 66,774    | 66,772    | -         | -         | -         | -           |
| 2022                                                                                                              | (1,136,144)                                      | 7.00                       | (486,920)         | (162,306) | (162,306) | (162,306) | (162,308) | -         | -         | -           |
| 2023                                                                                                              | 714,395                                          | 7.00                       | 408,227           | 102,056   | 102,056   | 102,056   | 102,056   | 102,059   | -         | -           |
| 2024                                                                                                              | (1,045,075)                                      | 7.00                       | (746,483)         | (149,296) | (149,296) | (149,296) | (149,296) | (149,296) | (149,299) | -           |
| 2025                                                                                                              | 90,322                                           | 7.00                       | 77,419            | 12,903    | 12,903    | 12,903    | 12,903    | 12,903    | 12,903    | 12,904      |
| Total Remaining Balance                                                                                           |                                                  |                            | (614,211)         |           |           |           |           |           |           |             |
| Net increase (decrease) in OPEB Expense                                                                           |                                                  |                            |                   | 250,058   | (129,869) | (129,871) | (196,645) | (34,334)  | (136,396) | 12,904      |

| Deferred (Inflows)/Outflows in OPEB Expense arising from the recognition of differences between projected & actual earnings on OPEB plan investments |                                                  |                            |                   |           |          |           |           |          |      |             |
|------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|----------------------------|-------------------|-----------|----------|-----------|-----------|----------|------|-------------|
| Fiscal                                                                                                                                               | Differences between actual & expected experience | Recognition Period (years) | Remaining Balance | 2025      | 2026     | 2027      | 2028      | 2029     | 2030 | There-after |
| 2019                                                                                                                                                 | (30,347)                                         | 5.00                       | -                 | -         | -        | -         | -         | -        | -    | -           |
| 2020                                                                                                                                                 | 18,043                                           | 5.00                       | -                 | -         | -        | -         | -         | -        | -    | -           |
| 2021                                                                                                                                                 | (755,533)                                        | 5.00                       | -                 | (151,105) | -        | -         | -         | -        | -    | -           |
| 2022                                                                                                                                                 | 1,236,152                                        | 5.00                       | 247,232           | 247,230   | 247,232  | -         | -         | -        | -    | -           |
| 2023                                                                                                                                                 | (173,824)                                        | 5.00                       | (69,532)          | (34,764)  | (34,764) | (34,768)  | -         | -        | -    | -           |
| 2024                                                                                                                                                 | (425,953)                                        | 5.00                       | (255,573)         | (85,190)  | (85,190) | (85,190)  | (85,193)  | -        | -    | -           |
| 2025                                                                                                                                                 | (451,702)                                        | 5.00                       | (361,362)         | (90,340)  | (90,340) | (90,340)  | (90,340)  | (90,342) | -    | -           |
| Total Remaining Balance                                                                                                                              |                                                  |                            | (439,235)         |           |          |           |           |          |      |             |
| Net increase (decrease) in OPEB Expense                                                                                                              |                                                  |                            |                   | (114,169) | 36,938   | (210,298) | (175,533) | (90,342) | -    | -           |

**NOTE J – TAX POSITION**

The primary tax positions made by the Collaborative are the existence of Unrelated Business Income Tax and the Collaborative's status as an exempt organization under the Internal Revenue Code. The Collaborative currently evaluates all tax positions, and makes determinations regarding the likelihood of those positions being upheld under review. For the years presented, and as a result of adoption, the Collaborative has not recognized any tax benefits or loss contingencies for uncertain tax positions based on its evaluations. The Collaborative is not currently under examination by any taxing jurisdiction. As a Chapter 40 governmental entity, the Collaborative is exempt from filing certain non-profit filings and, accordingly, there are no returns currently open for examination.

**NOTE K – COMMONWEALTH OF MASSACHUSETTS SURPLUS REVENUE RETENTION (OSD)**

The excess (deficiency) of revenue received from departments of the Commonwealth of Massachusetts is the amount in accordance with the Commonwealth of Massachusetts Not-For-Profit Provider Surplus Revenue Retention Policy, pursuant to 808CMR 1.19(3) of the Pricing, Reporting, and Auditing for Social Programs, which allows a provider to retain, for future use, a portion of annual net surplus. Net surplus from the revenues and expenses with services provided to purchasing agencies, which are subject to 808CMR 1.00, may not exceed 20% of the provider's revenues derived from contracts with state departments annually. For fiscal 2016 and beyond, there is no limit on the cumulative amount of the provider's net surplus. For the year ended June 30, 2025, the Collaborative had no surplus revenue from contracts with state departments.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE L – DISCLOSURES REQUIRED UNDER MASSACHUSETTS GENERAL LAW C.40 § 4E**

Names, duties and total compensation of the five most highly compensated employees

The five highest compensated employees of the Collaborative during fiscal year 2025 were as follows:

| <u>Name</u>         | <u>Title</u>                | <u>Total Compensation</u> |
|---------------------|-----------------------------|---------------------------|
| Chris A. Scott, PhD | Executive Director          | \$247,526                 |
| Joia Mercurio       | Deputy Director             | \$149,915                 |
| Nicole Noska        | Principal                   | \$145,196                 |
| Kari Ann Morrin     | Director of Human Resources | \$140,964                 |
| Matthew Gentile     | Director of DDS Services    | \$135,806                 |

Executive Director:

Responsible for the proper fiscal management of Collaborative Programs. Administer and coordinate all programs and services offered by the Collaborative. Develop and propose an annual budget to the Board of Directors. Ensure Collaborative is operating within and in compliance with federal and state laws.

Deputy Director:

Responsible for supervising the effective and efficient implementation of programs and the payroll department. Assist in the creation of required state reports, records and other documentation. Keep the executive director informed about what is happening at the program level.

Director Human Resources:

Responsible for administering personnel programs and policies for the Collaborative and ensuring that proper practices are being followed. Handle all aspects with the hiring process. Manage the day-to-day human resource functions.

Principal:

Responsible to ensure program curriculum is aligned with Massachusetts Curriculum Frameworks. Other responsibilities include, ensure safety and structure of program, coordination and review all IEPs, schedule and participate in IEP meetings, communicate with parents, LEAs and outside agencies, and interview student referrals.

Director of DDS Services:

Responsible for coordinating services and activities relating to vocational preparedness and program enhancement while being the liaison between the Collaborative and local business partners. Other responsibilities include supervising direct support and job development staff and overseeing state agency contracts.

Amounts expended on services for individuals aged 22 years and older

Total direct costs incurred by the Collaborative in its over 21 programs, funded in part by contracts with agencies of the Commonwealth of Massachusetts, totaled \$3,902,632 for the year ended June 30, 2025, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments.

Amounts expended on administration and overhead

Administrative expenses of \$2,172,402 for the year ended June 30, 2025, include all costs that cannot be directly or reasonably applied to a program of the Collaborative. Administrative expenses include salaries, related benefits and payroll taxes, associated with the Collaborative's administrative office (i.e., Executive Director, finance staff, human resources, etc.), as well as other costs associated with maintaining that office (i.e. occupancy, supplies, etc.). The Collaborative directly applies salaries, where appropriate, to its programs and allocates related employee benefits and taxes to those programs. Occupancy, supplies, maintenance and any other cost that can be directly applied, or reasonably allocated, are reported under program expense.

Accounts held by the Collaborative that may be spent at the discretion of another person or entity

The Collaborative does not hold any accounts that may be spent at the discretion of another person or entity.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE L – DISCLOSURES REQUIRED UNDER MASSACHUSETTS GENERAL LAW C.40 § 4E -  
*continued***

Transactions between the Collaborative and any related for-profit or non-profit organization

Other than the leases described below, the Collaborative had no transactions between the Collaborative and any related for-profit or non-profit organization.

Transactions or contracts related to purchase, sale, rental or lease of real property

Transactions or contracts related to the purchase, sale, rental, or lease of real property are described in Notes C and D to the financial statements. The Collaborative leases classroom and other program space within Tyngsborough, a member district. For the year ended June 30, 2025, rent expense under this lease was \$255,950. During the year ended June 30, 2020, the Collaborative paid \$1,000,000 for improvements to the leased space within Tyngsborough. The improvements are depreciated in the government wide financial statements over the lease term.

Annual determination and disclosure of cumulative surplus

| Cumulative Surplus Calculation – FY24 |                                                      |                           |               | Page(s) in<br>financial<br>statements |
|---------------------------------------|------------------------------------------------------|---------------------------|---------------|---------------------------------------|
| (A)                                   | <b>Surplus as of June 30, 2024</b>                   | \$                        | 7,499,174     | (A) <b>p. 12</b>                      |
|                                       | <i>(Breakdown of use of 2024 surplus)</i>            |                           |               |                                       |
|                                       | B(1) used to support the FY25 budget                 | \$                        | -             |                                       |
|                                       | B(2) issued as credits to member districts           | \$                        | 1,695,822     |                                       |
|                                       | B(3) issued as a check(s) to member district(s)      | \$                        | -             |                                       |
|                                       | B(4) deposited to a restricted account(s)            | \$                        | -             |                                       |
| (B)                                   | <b>Board voted uses of surplus funds during FY25</b> | <i>(total from B1:B4)</i> | \$ 1,695,822  | (B) <b>p. 12</b>                      |
| (C)                                   | <b>Unexpended FY25 General Funds</b>                 |                           | \$ 1,811,454  | (C) <b>p. 12</b>                      |
| (D)                                   | Cumulative Surplus as of June 30, 2025               | (A) - (B) + (C) = (D)     | \$ 7,614,806  | (D) <b>p. 12</b>                      |
| (E)                                   | <b>FY25 Total General Fund Expenditures*</b>         |                           | \$ 25,707,009 | (E) <b>p. 12</b>                      |
| (F)                                   | Cumulative Surplus Percentage                        | (D) ÷ (E)                 | <b>29.62%</b> | (F)                                   |

**CUMULATIVE SURPLUS REDUCTION**  
**Allowable uses of surplus - in excess of the 25% limit**

|     |                                                               |                     |           |           |
|-----|---------------------------------------------------------------|---------------------|-----------|-----------|
| (G) | Cumulative surplus as of June 30, 2025                        | \$                  | 7,614,806 |           |
|     |                                                               | 25% limit (allowed) | \$        | 6,426,752 |
| (H) | Cumulative Surplus <b>REDUCTIONS</b>                          |                     |           |           |
|     | (H)1 Credited to member districts for tuition, services, etc. | \$                  | 1,200,000 | ***       |
|     | (H)2 Deposited to an established trust and/or reserve fund    | \$                  | -         |           |
|     | (H)3 Returned (check) to school districts/towns               | \$                  | -         |           |
|     | <b>Total Reductions</b>                                       | \$                  | 1,200,000 |           |

**FY25 Cumulative Surplus Percentage after Reductions      24.95%**

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE L – DISCLOSURES REQUIRED UNDER MASSACHUSETTS GENERAL LAW C.40 § 4E -  
*continued***

\*Reconciliation of Total General Fund Expenditures to the Statement of Revenues, Expenditures and Changes in Fund Balances – Governmental Funds on page 12:

|                                                        |                     |
|--------------------------------------------------------|---------------------|
| Total Expenditures:                                    | \$28,961,498        |
| OPEB Obligation Funding:                               | -                   |
| Intergovernmental Expense:                             | <u>(3,365,600)</u>  |
|                                                        | 25,595,898          |
| FY25 depreciation on leasehold improvements:           | <u>111,111**</u>    |
| Total General Fund Expenditures per calculation above: | <u>\$25,707,009</u> |

\*\*During the year ended June 30, 2020, the Collaborative paid for \$1,000,000 of improvements to a leased facility. The payment was approved and budgeted by the Collaborative’s board of directors. However, because this was a special one-time payment, the Collaborative requested clarification from the Department of Elementary and Secondary Education (“DESE”) regarding treatment of the expenditure. DESE requested that the \$1,000,000 capital expenditure be treated as an expenditure over the remaining lease term of 9 years for purposes of determining the cumulative surplus funds in excess of 25% of general fund expenditures. The annual amount to be reported as an expenditure is \$111,111.

\*\*\*Prior to June 30, 2025, the Collaborative’s board of directors voted to return \$1,000,000 of cumulative general fund surplus to member districts. During the November 20, 2025 board meeting, the Collaborative elected to return an additional \$200,000 to the member districts to comply with the 25% cumulative surplus allowance.

**Valley Collaborative**  
Statement of Revenues, Expenditures and Changes in Fund Balance  
of the General Fund - Budget to Actual  
For the year ended June 30, 2025

|                                      | <b>Original<br/>Budget</b> | <b>Final Budget</b> | <b>Actual<br/>Amounts</b> | <b>Variance with<br/>Final Budget<br/>Favorable<br/>(Unfavorable)</b> |
|--------------------------------------|----------------------------|---------------------|---------------------------|-----------------------------------------------------------------------|
| Revenues:                            |                            |                     |                           |                                                                       |
| Tuition and services                 | \$ 19,200,000              | \$ 21,800,000       | \$ 22,682,559             | \$ 882,559                                                            |
| Adult services                       | 4,900,000                  | 4,900,000           | 4,477,614                 | (422,386)                                                             |
| Other                                | 700,000                    | 700,000             | 51,671                    | (648,329)                                                             |
| Interest                             | 30,000                     | 30,000              | 54,508                    | 24,508                                                                |
| Intergovernmental revenue            | -                          | -                   | 3,365,600                 | 3,365,600                                                             |
| Total revenue and other support      | <u>24,830,000</u>          | <u>27,430,000</u>   | <u>30,631,952</u>         | <u>3,201,952</u>                                                      |
| Expenses:                            |                            |                     |                           |                                                                       |
| Salaries                             | 17,173,652                 | 18,973,652          | 18,033,851                | 939,801                                                               |
| Employee benefits and taxes          | 2,918,119                  | 3,431,619           | 3,199,375                 | 232,244                                                               |
| Operating expenses                   | 3,527,700                  | 3,539,200           | 2,945,280                 | 593,920                                                               |
| Leases and rentals                   | 618,247                    | 593,247             | 625,641                   | (32,394)                                                              |
| On-behalf retirement payment expense | -                          | -                   | 3,365,600                 | (3,365,600)                                                           |
| Total expenses                       | <u>24,237,718</u>          | <u>26,537,718</u>   | <u>28,169,747</u>         | <u>(1,632,029)</u>                                                    |
| Excess of revenues over expenses     | <u>\$ 592,282</u>          | <u>\$ 892,282</u>   | <u>\$ 2,462,205</u>       | <u>\$ 1,569,923</u>                                                   |
| Other Budget Items:                  |                            |                     |                           |                                                                       |
| Credits to member districts          | \$ -                       | \$ -                | \$ 1,695,822              | \$ (1,695,822)                                                        |
| Capital budget items, net of gain    | 575,000                    | 875,000             | 650,751                   | 224,249                                                               |
| OPEB obligation funding              | -                          | -                   | -                         | -                                                                     |
|                                      | <u>\$ 575,000</u>          | <u>\$ 875,000</u>   | <u>\$ 2,346,573</u>       | <u>\$ (1,471,573)</u>                                                 |

Note: The schedule above is presented on the same basis used by the Collaborative to present its internal budget to actual comparison and account groupings are not necessarily consistent with the Statement of Revenue, Expenditures and Changes in Fund Balances presented on page 12. Also, capital budget items presented above include actual capital outlays and transfers made to or from the Capital Reserve Fund.

**Valley Collaborative**  
**OPEB Plan - Required Supplementary Information**  
**June 30, 2025**

| <b>Year</b>   | <b>Actuarial<br/>Determined<br/>Contribution</b> | <b>Contributions<br/>in relation to<br/>the actuarially<br/>determined<br/>contribution</b> | <b>Contribution<br/>deficiency<br/>(excess)</b> | <b>Covered<br/>employee<br/>payroll</b> | <b>Contributions<br/>as a percentage<br/>of covered<br/>employee<br/>payroll</b> |
|---------------|--------------------------------------------------|---------------------------------------------------------------------------------------------|-------------------------------------------------|-----------------------------------------|----------------------------------------------------------------------------------|
| June 30, 2019 | \$ 880,811                                       | \$ (61,922)                                                                                 | \$ 818,889                                      | \$ 11,092,407                           | 0.56%                                                                            |
| June 30, 2020 | \$ 951,385                                       | \$ (45,883)                                                                                 | \$ 905,502                                      | \$ 11,425,179                           | 0.40%                                                                            |
| June 30, 2021 | \$ 903,135                                       | \$ (51,730)                                                                                 | \$ 851,405                                      | \$ 10,818,546                           | 0.48%                                                                            |
| June 30, 2022 | \$ 996,816                                       | \$ (1,694,497)                                                                              | \$ (697,681)                                    | \$ 11,143,102                           | 15.21%                                                                           |
| June 30, 2023 | \$ 822,753                                       | \$ (128,142)                                                                                | \$ 694,611                                      | \$ 14,197,170                           | 0.90%                                                                            |
| June 30, 2024 | \$ 1,007,032                                     | \$ (91,727)                                                                                 | \$ 915,305                                      | \$ 14,623,085                           | 0.63%                                                                            |
| June 30, 2025 | \$ 893,884                                       | \$ (109,715)                                                                                | \$ 784,169                                      | \$ 17,432,244                           | 0.63%                                                                            |

**Schedule Presentation**

This schedule is intended to present information for 10 years. Until a 10-year trend is compiled, information is presented for those years for which information is available.



**Valley Collaborative**  
**OPEB Plan - Required Supplementary Information**  
**As of the June 30, 2025 Measurement Date**

**Schedule of Changes in the Collaborative's Net OPEB Liability and Related Ratios**

| <b>Valuation Date:</b>                                                       | <b>July 1, 2024</b>  | <b>July 1, 2023</b>  | <b>July 1, 2022</b>  | <b>July 1, 2021</b>  | <b>July 1, 2020</b>  | <b>July 1, 2019</b>  | <b>July 1, 2018</b>  | <b>July 1, 2017</b>  |
|------------------------------------------------------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <b>For the Measurement Period ending on the Measurement Date of:</b>         | <b>June 30, 2025</b> | <b>June 30, 2024</b> | <b>June 30, 2023</b> | <b>June 30, 2022</b> | <b>June 30, 2021</b> | <b>June 30, 2020</b> | <b>June 30, 2019</b> | <b>June 30, 2018</b> |
| <b>For the Reporting Period &amp; Fiscal Year ending on:</b>                 | <b>June 30, 202</b>  | <b>June 30, 2024</b> | <b>June 30, 2023</b> | <b>June 30, 2022</b> | <b>June 30, 2021</b> | <b>June 30, 2020</b> | <b>June 30, 2019</b> | <b>June 30, 2018</b> |
| <b>Total OPEB Liability</b>                                                  | 10,333,433           | 8,654,814            | 8,406,758            | 7,855,437            | 7,760,675            | 7,321,481            | 6,291,640            | 4,270,784            |
| I. Service Cost                                                              | 802,329              | 948,235              | 747,196              | 917,149              | 804,839              | 776,751              | 752,044              | 608,129              |
| II. Interest on Total OPEB Liability, Service Cost, and Benefit Payments     | 512,464              | 436,623              | 431,978              | 367,674              | 344,281              | 299,442              | 374,432              | 18,642               |
| III. Changes in Benefit terms                                                | -                    | -                    | -                    | -                    | -                    | -                    | -                    | -                    |
| IV. Difference between Expected & Actual Plan Experience                     | 383,219              | -                    | (1,278,180)          | -                    | (1,125,612)          | (469)                | (1,703,175)          | -                    |
| V. Changes of Assumption                                                     | 90,322               | (1,045,075)          | 714,395              | (1,136,144)          | 467,416              | -                    | 2,659,477            | 43,514               |
| VI. Benefit Payments Excluding Implicit Cost                                 | (85,145)             | (77,701)             | (54,947)             | (53,917)             | (50,682)             | (44,753)             | (48,295)             | (30,590)             |
| VII. Implicit Cost Amount                                                    | (24,570)             | (14,026)             | (9,121)              | -                    | (1,048)              | (1,130)              | (13,627)             | -                    |
| VIII. Total Benefit payments including Implicit Cost [VI.+VII.]              | (109,715)            | (91,727)             | (64,068)             | (53,917)             | (51,730)             | (45,883)             | (61,922)             | (30,590)             |
| IX. Net Change in OPEB liability [I.+II.+III.+IV.+V.+VIII.]                  | 1,678,619            | 248,056              | 551,321              | 94,762               | 439,194              | 1,029,841            | 2,020,856            | 639,695              |
| X. Total OPEB liability - beginning of period                                | 8,654,814            | 8,406,758            | 7,855,437            | 7,760,675            | 7,321,481            | 6,291,640            | 4,270,784            | (148,019)            |
| XI. Prior Period Adjustment for Retirees not Previously Reflected            | -                    | -                    | -                    | -                    | -                    | -                    | -                    | -                    |
| XII. Total OPEB Liability - end of period [IX.+X.+XI.]                       | 10,333,433           | 8,654,814            | 8,406,758            | 7,855,437            | 7,760,675            | 7,321,481            | 6,291,640            | 491,676              |
| <b>Plan Fiduciary Net Position</b>                                           | 8,282,784            | 7,374,283            | 6,598,707            | 6,030,973            | 5,271,479            | 4,266,767            | 4,039,225            | 3,779,108            |
| XIII. Earning from Plan Investments                                          | 908,501              | 775,576              | 503,660              | (881,086)            | 1,004,712            | 227,542              | 260,117              | 236,892              |
| XIV. Employer Contribution to trust                                          | 109,715              | 91,727               | 128,142              | 1,694,497            | 51,730               | 45,883               | 61,922               | 30,590               |
| XV. Benefit payments from trust, including refunds of member contributions   | (109,715)            | (91,727)             | (64,068)             | (53,917)             | (51,730)             | (45,883)             | (61,922)             | (30,590)             |
| XVI. Administrative expense                                                  | -                    | -                    | -                    | -                    | -                    | -                    | -                    | -                    |
| XVII. Other                                                                  | -                    | -                    | -                    | -                    | -                    | -                    | -                    | -                    |
| XVIII. Net change in plan fiduciary net position [XIII.+XIV.+XV.+XVI.+XVII.] | 908,501              | 775,576              | 567,734              | 759,494              | 1,004,712            | 227,542              | 260,117              | 236,892              |
| XIX. Plan fiduciary net position - beginning of period                       | 7,374,283            | 6,598,707            | 6,030,973            | 5,271,479            | 4,266,767            | 4,039,225            | 3,779,108            | 3,542,216            |
| XX. Plan fiduciary net position - end of period [XVIII.+XIX.]                | 8,282,784            | 7,374,283            | 6,598,707            | 6,030,973            | 5,271,479            | 4,266,767            | 4,039,225            | 3,779,108            |
| XXI. Net OPEB Liability [XII.-XX.]                                           | 2,050,649            | 1,280,531            | 1,808,051            | 1,824,464            | 2,489,196            | 3,054,714            | 2,252,415            | 491,676              |
| XXII. Plan fiduciary net position as a % of total OPEB liability [XX./XII.]  | 80.16%               | 85.20%               | 78.49%               | 76.77%               | 67.93%               | 58.28%               | 64.20%               | 768.62%              |
| XXIII. Covered employee payroll                                              | 17,432,244           | 14,623,085           | 14,197,170           | 11,143,102           | 10,818,546           | 11,425,179           | 11,092,407           | 11,775,259           |
| XXIV. Plan NOL as % of covered employee payroll [XXI./XXIII]                 | 11.76%               | 8.76%                | 12.74%               | 16.37%               | 23.01%               | 26.74%               | 20.31%               | 4.18%                |
| Single Discount Rate to calculate Plan Liabilities                           | 5.22%                | 5.45%                | 4.69%                | 5.04%                | 4.25%                | 4.25%                | 4.25%                | 7.50%                |

**Schedule Presentation**

This schedule is intended to present information for 10 years. Until a 10-year trend is compiled, information is presented for those years for which information is available.

See independent auditor's report.

**Valley Collaborative**  
OPEB Plan - Required Supplementary Information  
As of the June 30, 2025 Measurement Date

Notes to Required Supplementary Information:

Valuation Date: Actuarially Determined Contribution was calculated as of July 1, 2024.

Actuarial Cost Method: Individual Entry Age Normal

Asset-Valuation Method: Market Value of Assets as of the Measurement Date, June 30, 2025.

Actuarial Assumptions:

Investment Rate of Return: 5.86%, net of OPEB plan investment expense, including inflation.

Municipal Bond Rate: 4.81% as of June 30, 2025 (source: S&P Municipal Bond 20-Year High Grade Index - SAPIHG)

Single Equivalent Discount Rate: 5.22%, net of OPEB plan investment expense, including inflation.

Inflation: 2.50% as of June 30, 2025 and for future periods

Salary Increases: 3.00% annually as of June 30, 2025 and for future periods

Cost of Living Adjustment: Not Applicable

Pre-Retirement Mortality: General: RP-2014 Mortality Table for Blue Collar Employees projected generationally with scale MP-2021, set forward 1 year for females  
Teachers: PubT-2010 Mortality Table (Headcount-weighted) for Employees projected generationally with scale MP-2021

Post-Retirement Mortality: General: RP-2014 Mortality Table for Blue Collar Healthy Annuitants projected generationally with scale MP-2021, set forward 1 year for females  
Teachers: PubT-2010 Mortality Table (Headcount-weighted) for Healthy Annuitants projected generationally with scale MP-2021

Disabled Mortality: General: RP-2014 Mortality Table for Blue Collar Healthy Annuitants projected generationally with scale MP-2021, set forward 1 year for males and 2 years for females  
Teachers: PubT-2010 Mortality Table (Headcount-weighted) for Healthy Annuitants projected generationally with scale MP-2021

**Valley Collaborative**  
OPEB Plan - Required Supplementary Information  
As of the June 30, 2025 Measurement Date

Notes to Required Supplementary Information (Continued):

Plan Membership

Plan Membership: At July 1, 2024, the OPEB plan membership consisted for the following

|                                                                   |            |
|-------------------------------------------------------------------|------------|
| Inactive employees or beneficiaries currently receiving benefits: | 15         |
| Active Employees:                                                 | <u>267</u> |
| Total:                                                            | 282        |

Events Subsequent to the Measurement Date

To the best of our knowledge there were no material events subsequent to the Measurement Date that would impact the figures shown in this report.

Changes in Assumptions:

From June 30, 2024 to June 30, 2025:

Due to the GASB 75 standards the discount rate has been changed from 5.45% to 5.22%.

Based on recommendations by PERAC, the mortality table has been updated to the RP-2014 Mortality Table projected generationally with scale MP-2021 for non-teachers and PubT-2010 Mortality Table projected generationally with scale MP-2021 for teachers.

Contributions/Withdrawals:

The contribution requirements of plan members and the Collaborative are established and may be amended through Collaborative ordinances. The Collaborative contributed \$0 for the period ending on the June 30, 2025 Measurement Date. For the year ending on the June 30, 2025 Measurement Date total Collaborative premiums plus implicit costs for the retiree medical program were \$109,715. \$24,570 of the \$109,715 represents implicit cost.

Census Data Manipulation:

In the absence of data, the following was assumed:

|                         |                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Spouse Sex:             | Male participants had female spouses and vice versa.                                                                                                                                                                                                                                                                                                                             |
| Spouse Age:             | Male spouses were three years older than female spouses and same sex spouses were the same age.                                                                                                                                                                                                                                                                                  |
| Hire Age:               | Participants who were not on the previous valuation were hired halfway between last valuation and the current valuation. If we did not have census data related to the last valuation, the participants were assumed to have been hired at age forty.                                                                                                                            |
| Retiree Age:            | Retirees had the same birth date as they had the prior valuation. If we did not have census data related to the last valuation, retirees who were enrolled in Active plans were assumed to be age sixty-two and retirees who were enrolled in Medicare Supplement plans were assumed to be age seventy-two. Those not enrolled in a medical plan were assumed to be sixty-seven. |
| School Demographics:    | Two thirds of school participants were teachers.                                                                                                                                                                                                                                                                                                                                 |
| Other Material Changes: | No other data changes were deemed to be material.                                                                                                                                                                                                                                                                                                                                |

**Valley Collaborative**  
**Schedule of the Collaborative's Proportionate Share of Net Pension Liability**  
**For the Year Ended June 30, 2025**

|                                                                                                              |        | <u><b>MTRS</b></u> | <u><b>MSERS</b></u> |
|--------------------------------------------------------------------------------------------------------------|--------|--------------------|---------------------|
| Collaborative's proportion of net pension liability                                                          | FY2015 | 0.07985%           | 0.02466%            |
|                                                                                                              | FY2016 | 0.08405%           | 0.07637%            |
|                                                                                                              | FY2017 | 0.08453%           | 0.08118%            |
|                                                                                                              | FY2018 | 0.09167%           | 0.08646%            |
|                                                                                                              | FY2019 | 0.08325%           | 0.10137%            |
|                                                                                                              | FY2020 | 0.08129%           | 0.08658%            |
|                                                                                                              | FY2021 | 0.07984%           | 0.07671%            |
|                                                                                                              | FY2022 | 0.08333%           | 0.09316%            |
|                                                                                                              | FY2023 | 0.08290%           | 0.09784%            |
|                                                                                                              | FY2024 | 0.08321%           | 0.11139%            |
| Collaborative's proportionate share of net pension liability                                                 | FY2015 | \$ 16,360,313      | \$ 2,806,546        |
|                                                                                                              | FY2016 | \$ 18,790,793      | \$ 10,530,873       |
|                                                                                                              | FY2017 | \$ 19,344,064      | \$ 10,410,850       |
|                                                                                                              | FY2018 | \$ 21,737,193      | \$ 11,438,238       |
|                                                                                                              | FY2019 | \$ 20,989,574      | \$ 14,834,931       |
|                                                                                                              | FY2020 | \$ 23,205,036      | \$ 14,855,001       |
|                                                                                                              | FY2021 | \$ 18,129,788      | \$ 8,006,281        |
|                                                                                                              | FY2022 | \$ 21,572,960      | \$ 12,958,656       |
|                                                                                                              | FY2023 | \$ 21,794,595      | \$ 14,331,557       |
|                                                                                                              | FY2024 | \$ 21,098,472      | \$ 15,733,379       |
| Collaborative's covered-employee payroll                                                                     | FY2015 | \$ 5,347,143       | \$ 4,285,929        |
|                                                                                                              | FY2016 | \$ 5,527,894       | \$ 4,254,279        |
|                                                                                                              | FY2017 | \$ 5,762,613       | \$ 4,635,195        |
|                                                                                                              | FY2018 | \$ 6,333,668       | \$ 6,028,713        |
|                                                                                                              | FY2019 | \$ 6,087,231       | \$ 6,039,995        |
|                                                                                                              | FY2020 | \$ 6,181,687       | \$ 5,305,358        |
|                                                                                                              | FY2021 | \$ 6,202,814       | \$ 4,668,914        |
|                                                                                                              | FY2022 | \$ 6,274,492       | \$ 5,856,826        |
|                                                                                                              | FY2023 | \$ 7,162,705       | \$ 6,145,191        |
|                                                                                                              | FY2024 | \$ 7,488,098       | \$ 7,832,325        |
| Collaborative's proportionate share of net pension liability as a percentage of its covered-employee payroll | FY2015 | 305.96%            | 65.48%              |
|                                                                                                              | FY2016 | 339.93%            | 247.54%             |
|                                                                                                              | FY2017 | 335.68%            | 224.60%             |
|                                                                                                              | FY2018 | 343.20%            | 189.73%             |
|                                                                                                              | FY2019 | 344.81%            | 245.61%             |
|                                                                                                              | FY2020 | 375.38%            | 280.00%             |
|                                                                                                              | FY2021 | 292.28%            | 171.48%             |
|                                                                                                              | FY2022 | 343.82%            | 221.26%             |
|                                                                                                              | FY2023 | 304.28%            | 233.22%             |
|                                                                                                              | FY2024 | 281.76%            | 200.88%             |
| Plan fiduciary net position as a percentage of total pension liability                                       | FY2015 | 55.38%             | 67.87%              |
|                                                                                                              | FY2016 | 52.73%             | 63.48%              |
|                                                                                                              | FY2017 | 54.25%             | 67.21%              |
|                                                                                                              | FY2018 | 54.84%             | 67.91%              |
|                                                                                                              | FY2019 | 53.95%             | 66.28%              |
|                                                                                                              | FY2020 | 50.67%             | 62.48%              |
|                                                                                                              | FY2021 | 62.03%             | 77.54%              |
|                                                                                                              | FY2022 | 57.75%             | 71.05%              |
|                                                                                                              | FY2023 | 58.48%             | 70.71%              |
|                                                                                                              | FY2024 | 61.45%             | 72.90%              |

Notes to Required Supplementary Information

MTRS is the Massachusetts Teachers' Retirement System. MSERS is the Massachusetts State Employees' Retirement System. Also, see Note E to financial statements.

Measurement Date

The amounts presented in this schedule were determined as of June 30, 2024.

Schedule Presentation

This schedule is intended to present information for 10 years. Until a 10-year trend is compiled, information is presented for those years for which information is available.

See independent auditor's report.

**Valley Collaborative**  
Schedule of Pension Contributions  
For the Year Ended June 30, 2025

|                                     | FY2015       | FY2016       | FY2017       | FY2018       | FY2019       | FY2020       | FY2021       | FY2022       | FY2023       | FY2024       |
|-------------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| <b>MTRS</b>                         |              |              |              |              |              |              |              |              |              |              |
| Contractually required contribution | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         |
| Contributions in relation to the    |              |              |              |              |              |              |              |              |              |              |
| contractually required contribution | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         |
| Contribution deficiency (excess)    | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         |
| Collaborative's covered-employee    |              |              |              |              |              |              |              |              |              |              |
| payroll                             | \$ 5,347,143 | \$ 5,527,894 | \$ 5,762,613 | \$ 6,333,668 | \$ 6,087,231 | \$ 6,181,687 | \$ 6,202,814 | \$ 6,274,492 | \$ 7,162,705 | \$ 7,488,098 |
| Contributions as a percentage of    |              |              |              |              |              |              |              |              |              |              |
| covered-employee payroll            | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        |
| <b>MSERS</b>                        |              |              |              |              |              |              |              |              |              |              |
| Contractually required contribution | \$ 240,012   | \$ 238,217   | \$ 259,571   | \$ 337,608   | \$ 338,240   | \$ 323,627   | \$ 284,804   | \$ 357,266   | \$ 374,857   | \$ 477,772   |
| Contributions in relation to the    |              |              |              |              |              |              |              |              |              |              |
| contractually required contribution | \$ 240,012   | \$ 238,217   | \$ 259,571   | \$ 337,608   | \$ 338,240   | \$ 323,627   | \$ 284,804   | \$ 357,266   | \$ 374,857   | \$ 477,772   |
| Contribution deficiency (excess)    | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         |
| Collaborative's covered-employee    |              |              |              |              |              |              |              |              |              |              |
| payroll                             | \$ 4,285,929 | \$ 4,254,279 | \$ 4,635,195 | \$ 6,028,713 | \$ 6,039,995 | \$ 5,305,358 | \$ 4,668,914 | \$ 5,856,826 | \$ 6,145,191 | \$ 7,832,325 |
| Contributions as a percentage of    |              |              |              |              |              |              |              |              |              |              |
| covered-employee payroll            | 5.60%        | 5.60%        | 5.60%        | 5.60%        | 5.60%        | 6.10%        | 6.10%        | 6.10%        | 6.10%        | 6.10%        |

Notes to Required Supplementary Information

MTRS is the Massachusetts Teachers' Retirement System. MSERS is the Massachusetts State Employees' Retirement System. Also, see Note E to financial statements.

Measurement Date

The amounts presented in this schedule were determined as of June 30, 2024.

Schedule Presentation

This schedule is intended to present information for 10 years. Until a 10-year trend is compiled, information is presented for those years for which information is available.

Contributions

The Collaborative is required to pay an annual appropriation as established by the Public Employees' Retirement Administration Commission (PERAC) for MSERS. No contribution is required for MTRS. The Commonwealth of Massachusetts as a nonemployer is legally responsible for the entire past service cost related to the Collaborative and therefore has a 100% special funding situation.



**FRITZ DEGUGLIELMO LLC**  
**CERTIFIED PUBLIC ACCOUNTANTS**  
**& BUSINESS ADVISORS**

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND  
ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS  
PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS***

To the Board of Directors of  
Valley Collaborative  
North Billerica, Massachusetts

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of Valley Collaborative (a collaborative organized under the Laws of the Commonwealth of Massachusetts), as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise Valley Collaborative's basic financial statements, and have issued our report thereon dated November 20, 2025.

**Report on Internal Control over Financial Reporting**

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

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

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

**Report on Compliance and Other Matters**

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

### **Purpose of this Report**

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



Certified Public Accountants

Newburyport, Massachusetts

November 20, 2025



# Central Administration

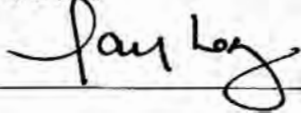
11 Executive Park Dr, Billerica MA 01862 | Tel: (978)528-7800 | [www.valleycollaborative.org](http://www.valleycollaborative.org)

## DETERMINATION OF CUMULATIVE SURPLUS (BOARD VOTE) For the Year Ended June 30, 2025

We, the Board of Directors of Valley Collaborative, have determined the fiscal year cumulative general fund surplus to be \$7,614,806 and have voted to accept said surplus as presented in the Cumulative Surplus worksheet in Note L to the financial statements.

We also certify that the representations made by management and the disclosures in the financial statements are accurate and have been correctly and completely disclosed as required by accounting principles generally accepted in the United States of America and under Commonwealth of Massachusetts laws for the year ended June 30, 2025.

Board Chair

  
\_\_\_\_\_

Date of Board Vote

11-20-2025





# Central Administration

11 Executive Park Dr, Billerica MA 01862 | Tel: (978)528-7800 | [www.valleycollaborative.org](http://www.valleycollaborative.org)

## ACCEPTANCE OF THE BOARD OF DIRECTORS

We, the Board of Directors of the Valley Collaborative, have voted to accept the representations of management and the expression of the opinions made by Fritz DeGuglielmo LLC as embodied in the financial statements, supplemental schedules and independent auditor's reports for the year ended June 30, 2025.

We also certify that the representations made by management and the disclosures in the financial statements are accurate and have been correctly and completely disclosed as required by accounting principles generally accepted in the United States of America and under Commonwealth of Massachusetts laws for the year ended June 30, 2025.

  
\_\_\_\_\_  
Board Chair

11-20-2025  
\_\_\_\_\_  
Date

## Progress Made Toward Achieving the Purpose and Objectives Set Forth in the Collaborative Agreement

### **District Improvement Planning**

The Valley Collaborative district planning process continued in the 2024-25 school year, as the team completed Valley's five-year district plan and began the process of action planning strategic initiatives they selected for implementation next year.

The Leadership Team launched its planning work in the fall with extensive community outreach, presenting the draft district plan and gathering feedback from parents, students and adults, staff, and some community partners across all schools and the adult program. Using shared materials designed to support consistency in messaging and process, team members presented the plan and posed the following questions for discussion and feedback:

- Do you think the current set of initiatives represents the work required for that objective?
- What questions, if any, do you have?
- What, if anything, do you believe is missing?

In December, the leaders who had facilitated these feedback sessions presented results to the entire Leadership Team. After discussing these community responses in depth and developing a new collaborative-wide perspective of the plan, the team then revised and finalized the plan's strategic initiatives.

The final element of the district plan that remained for development were the outcome measures—what success will look like and how Valley will know if it has achieved the plan's objectives. The Executive Team met in February to begin outcome development, proposing an initial set of measures for consideration by the Leadership Team in early April. At that meeting, the team reviewed and revised the proposed outcomes, completing the district plan—and also began the work of prioritizing strategic initiatives to action plan for implementation in 2025-26.

The team then identified five leaders to serve as district plan project leaders, one responsible for each of the five initiatives selected for implementation. These leaders strategically selected individuals across the collaborative for their teams, ensuring that people with the necessary expertise and a collaborative-wide perspective were at the table. The leaders participated in training to prepare them for facilitating development and oversight of action plans and facilitated the first round of action planning in May. Action plan teams will continue development of these plans in the fall.

The five initiatives selected for implementation are as follows:

1. Continue to develop and implement new programming to meet Individual Education Plan, Individual Support Plan, and Life Plan goals and objectives of Valley's K-12 students and adult services participants through: community life skills opportunities; expanded academic opportunities through technology; transitional opportunities; and community-based day supports activities.
2. Implement a professional learning and evaluation management system that will assist Valley in leveraging data to plan, manage, track, and evaluate employees and their training and professional learning activities.
3. Strengthen outreach and communication between staff, students/DDS and MRC individuals, and families in order to foster a sense of belonging.
4. Redevelop Valley's informational materials to reflect the mission & vision and assist in educating community members about Valley's program offerings, through updated materials including Valley's website.
5. Work with stakeholders—including families, districts, DDS and MRC individuals, and community partners—to expand vocational placements for students in order to support their development as contributing members of their communities.

# Valley Collaborative's District Improvement Plan

Designed to achieve the Purpose and Objectives set forth in the Collaborative Agreement

2026-2031

## Plan Overview

### Valley Collaborative's Articles of Agreement

#### ARTICLE II

#### Mission, Objectives, Focus, and Purpose

The mission of the Collaborative is to conduct educational programs and/or services for member districts in a cost-effective manner and to increase educational opportunities and to improve educational outcomes for its students. The purpose of the Collaborative is to provide high quality intensive educational, therapeutic and transitional programs and related services to individuals with disabilities referred by member districts, non-member districts and social service agencies, including both children and adults, and to provide professional development to educators. The focus of the Collaborative is the provision of special education, transitional, occupational, and therapeutic programs and services in the least restrictive environment and comprehensive professional development within the local communities of the member districts. The overall objectives of the Collaborative include improving the academic achievement and/or occupational skills of students and individuals with disabilities in the least restrictive environment through high quality programs and services; offering a variety of high quality professional development opportunities to general and special education teachers and related service providers; and offering its programs and services in a cost-effective manner.

#### *Mission*

To work collaboratively in order to create a diverse, equitable, inclusive, and responsive learning environment that recognizes individuals and empowers them to navigate confidently with optimal independence in their community and fosters lifelong learning.

#### *Vision*

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

#### *Theory of Action*

*If we...*

- Identify students' immediate and long-term individualized goals, strengths, and needs and provide support to meet them, and...
- Build the capacity of, and invest in, our staff, and...
- Invest in community building across the Collaborative, with all stakeholder groups,

*Then we will...*

- Increase student independence and prepare students for successful post-secondary placement and adult living
- Increase staff professional capacity and the retention of high quality and appropriately certified staff
- Improve the engagement of all stakeholders in the Collaborative community

| <i>Strategic Objectives</i>                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>1. All students and adults will be provided with high quality programming in a diverse, equitable, and inclusive environment in order to prepare them for successful adult living.</i>                                                                                                                                                                                                 | <i>2. Valley Collaborative will provide professional learning in order to build capacity and retain high quality staff, while fostering and promoting a diverse, equitable, and inclusive environment.</i>                                                                                           | <i>3. Valley Collaborative will foster diversity, equity, and inclusivity in order to promote a sense of belonging and engagement for all stakeholders (students, adults, families, staff, districts, community partners).</i>                               |
| <i>Strategic Initiatives</i>                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                              |
| a.) Continue to develop and implement new programming to meet Individual Education Plan, Individual Support Plan, and Life Plan goals and objectives of Valley’s K-12 students and adult services participants through: community life skills opportunities; expanded academic opportunities through technology; transitional opportunities; and community-based day supports activities. | a.) Create and implement a robust professional learning program in order to train all professional staff, including Special Education Assistants, for their unique roles at Valley Collaborative, through various learning modules spanning special education topics, therapies, school safety, etc. | a.) Strengthen outreach and communication between staff, students/DDS and MRC individuals, and families in order to foster a sense of belonging.                                                                                                             |
| b.) Develop and maintain the outdoor learning program so that students and individuals will be exposed to more wellness opportunities to support individual growth.                                                                                                                                                                                                                       | b.) Implement a professional learning and evaluation management system that will assist Valley in leveraging data to plan, manage, track, and evaluate employees and their training and professional learning activities.                                                                            | b.) Redevelop Valley’s informational materials to reflect the mission & vision and assist in educating community members about Valley’s program offerings, through updated materials including Valley’s website.                                             |
| c.) Complete the Department of Elementary and Secondary Education (DESE) Mid-Cycle Review Self-Assessment of Valley’s practices and policies by August of 2024 and complete the review in its entirety by the Spring of 2025, to ensure high quality programming.                                                                                                                         | c.) Implement a professional learning management system that expands professional learning offerings aligned with Valley’s District goals and ensures Individual Professional Development Plan (IPDP) compliance.                                                                                    | c.) Work with stakeholders—including families, districts, DDS and MRC individuals, and community partners—to expand vocational placements for students in order to support their development as contributing members of their communities.                   |
| d.) Complete the new DESE Collaborative Financial Review by the Spring of 2025 to ensure financial stability and health, so that Valley maintains sustainable and successful programming.                                                                                                                                                                                                 | d.) Improve evaluation tracking and organization, and goal alignment to Valley’s district goals.                                                                                                                                                                                                     | d.) Develop and administer a survey for member district Special Education Directors to gather their feedback on student experiences within their districts and student trends in order to anticipate programmatic needs and maintain responsive programming. |
| e.) Complete the DESE Coordinated Program Review Self-Assessment of Valley’s practices and policies by August of 2027 and complete the review in its entirety by the Spring of                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                      | e.) Analyze student referral data by implementing a new admissions module, to ensure Valley continues to offer diverse, equitable and inclusive programming to promote a sense of belonging.                                                                 |

|                                                                                                                                                                                      |                                                                                                                                                           |                                                                                                                                                                                                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2028, to ensure high quality programming.                                                                                                                                            |                                                                                                                                                           |                                                                                                                                                                                                                                                                                        |
| f.) Complete the Department of Developmental Services (DDS) Adult Services Licensure and Certification Audit – Full Audit by the Spring of 2025, to ensure high quality programming. |                                                                                                                                                           |                                                                                                                                                                                                                                                                                        |
| <b>Outcomes</b>                                                                                                                                                                      |                                                                                                                                                           |                                                                                                                                                                                                                                                                                        |
| 1.1 Department of Elementary and Secondary Education finds Valley in compliance on 85% or more of its Coordinated Program Review (CPR) and Mid Cycle Review (MCR) criteria           | 2.1 By 2030, Valley will increase staff retention by 10% as evidenced by longevity data for both certified staff and support staff                        | 3.1 Valley will set and meet a Year 5 improvement target for sense of belonging and student engagement, using the 2023-24 DEI (sense of belonging) student, staff, and adult services survey results and the 2024-25 Special Education Directors' survey results to determine baseline |
| 1.2 Department of Developmental Services (DDS) finds Valley in compliance on 80% or more of its Adult Services Licensure and Certification Audit criteria                            | 2.2 Professional development opportunities will receive an overall rating of “very good” or higher on feedback evaluation forms 75% of the time by Year 5 | 3.2 Valley will conduct a minimum of one family/community at large engagement initiative, such as an open house, at each school annually                                                                                                                                               |
| 1.3 Department of Elementary and Secondary Education finds Valley in compliance on 85% or more of its Financial Review criteria                                                      |                                                                                                                                                           | 3.3 Valley will develop and implement promotional materials by end of Year 5 (website, brochures, videos)                                                                                                                                                                              |
| 1.4 Valley will conduct a minimum of 3 new outdoor learning opportunities annually                                                                                                   |                                                                                                                                                           | 3.4 Valley will continue to develop financial budgets in response to changing enrollment trends                                                                                                                                                                                        |



# Central Administration

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

## ACCEPTANCE OF THE BOARD OF DIRECTORS

We, the Board of Directors of the Valley Collaborative, have voted to accept the Annual Report as submitted for the fiscal year ended June 30, 2025.

We also certify that the representations made in the annual report are accurate and have been disclosed in accordance with Department guidelines.

Dr. Jay Lang, Board Chairman

12-4-2025

Date of Board Vote

**Valley Collaborative**

Financial Statements

For the Year Ended June 30, 2025

**Valley Collaborative**  
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For the Year Ended June 30, 2025

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**FRITZ DEGUGLIELMO LLC**  
**CERTIFIED PUBLIC ACCOUNTANTS**  
**& BUSINESS ADVISORS**

**INDEPENDENT AUDITOR'S REPORT**

To the Board of Directors of  
Valley Collaborative  
North Billerica, Massachusetts

**Report on the Audit of the Financial Statements**

**Opinions**

We have audited the accompanying financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of Valley Collaborative, a collaborative organized under the Laws of the Commonwealth of Massachusetts, as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise Valley Collaborative's basic financial statements as listed in the table of contents.

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

***Basis for Opinions***

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

**Responsibilities of Management for the Financial Statements**

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

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

**Auditor's Responsibilities for the Audit of the Financial Statements**

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

likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

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

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

#### **Required Supplementary Information**

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis, budgetary comparison information, OPEB plan required supplementary information and pension schedules on pages 3-7 and 32-38 be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

#### **Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated November 20, 2025, on our consideration of Valley Collaborative's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of Valley Collaborative's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Valley Collaborative's internal control over financial reporting and compliance.



Certified Public Accountants

Newburyport, Massachusetts  
November 20, 2025

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

Our discussion and analysis of Valley Collaborative's ("The Collaborative") financial performance provides an overview of the Collaborative's financial activities for the fiscal year ended June 30, 2025 with comparative information from the fiscal years ended June 30, 2024 and 2023. Please read it in conjunction with the financial statements that begin on page 8.

**Overview of Financial Statements**

This discussion and analysis is intended to serve as an introduction to the Collaborative's financial statements. The Collaborative's financial statements comprise three components: 1) government-wide financial statements; 2) fund financial statements; and 3) notes to the financial statements. This report also contains other supplementary information in addition to the basic financial statements themselves.

**Government-wide Statements:**

The government-wide financial statements report information about the Collaborative as a whole using accounting methods similar to those used by private sector companies.

- The **Statement of Net Position** presents information on all of the Collaborative's assets and liabilities with the difference between the two reported as net position. It is one way of measuring the Collaborative's financial health or position.
- The **Statement of Activities** presents information showing how the Collaborative's net position changed during the most recent fiscal year. All of the current year's revenues and expenses are accounted for in the Statement of Activities regardless of when cash is received or paid.

Over time, increases or decreases in the Collaborative's net position is an indicator of whether its financial position is improving or deteriorating. The reader will also need to consider other non-financial factors such as changes in economic conditions when evaluating the overall financial health of the Collaborative.

**Fund Financial Statements:**

Funds are accounting devices used to keep track of specific sources of funding and spending in particular categories: governmental funds, proprietary funds, and fiduciary funds. Presently, the Collaborative has only governmental and fiduciary funds.

- **Governmental funds** – The Collaborative's basic services are included in governmental funds, which generally focus on: 1) how cash and other financial assets that can readily be converted to cash flow in and out, and 2) the balances left at year-end that are available for spending. Consequently, the governmental funds statements provide a detailed short-term view that helps to determine whether there are more or fewer financial resources that can be spent in the near future to finance the Collaborative's programs. Because this information does not encompass the additional long-term focus of the government-wide statements, additional information (reconciliation schedules) is provided following the governmental funds statements that explains the relationship (or differences) between these two types of financial statement presentations.
- **Fiduciary fund** – Fiduciary funds are used to account for resources held for the benefit of parties outside the government. Fiduciary funds are not reflected in the government-wide financial statements because the resources of those funds are not available to support the Collaborative's own programs.

**Notes to the Financial Statements:**

The Notes to the Financial Statements provide additional information that is essential to a full understanding of the information provided in the Collaborative's financial statements.

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

**Required Supplementary Information:**

In addition to the basic financial statements and accompanying notes, this report also presents certain required supplementary information which is required to be disclosed by accounting principles generally accepted in the United States of America.

**Government-Wide Financial Highlights**

**Collaborative's Net Position:**

ASSETS AND DEFERRED OUTFLOWS OF RESOURCES

|                                                 | <u>2025</u>         | <u>2024</u>         | <u>2023</u>         |
|-------------------------------------------------|---------------------|---------------------|---------------------|
| Assets                                          |                     |                     |                     |
| Current Assets                                  | \$10,763,763        | \$11,859,954        | \$ 9,638,049        |
| Non-current assets, net**                       | <u>9,107,606</u>    | <u>9,718,962</u>    | <u>10,385,960</u>   |
| Total Assets                                    | <u>19,871,369</u>   | <u>21,578,916</u>   | <u>20,024,009</u>   |
| Deferred Outflows Related to OPEB               | <u>947,666</u>      | <u>1,090,530</u>    | <u>1,943,312</u>    |
| Total Assets and Deferred Outflows of Resources | <u>\$20,819,035</u> | <u>\$22,669,446</u> | <u>\$21,967,321</u> |

LIABILITIES, DEFERRED INFLOWS OF RESOURCES AND NET POSITION

|                                                       |                     |                     |                     |
|-------------------------------------------------------|---------------------|---------------------|---------------------|
| Liabilities                                           |                     |                     |                     |
| Current Liabilities                                   | \$ 1,880,184        | \$ 3,163,986        | \$ 2,933,189        |
| Long Term Liabilities**                               | <u>4,550,391</u>    | <u>4,057,503</u>    | <u>4,925,869</u>    |
| Total Liabilities                                     | <u>6,430,575</u>    | <u>7,221,489</u>    | <u>7,859,058</u>    |
| Deferred Inflows Related to OPEB                      | <u>2,724,696</u>    | <u>3,285,540</u>    | <u>3,037,142</u>    |
| Net Position                                          |                     |                     |                     |
| Unrestricted                                          | \$ 3,787,127        | \$ 4,023,633        | \$ 2,658,926        |
| Restricted – grants and contributions                 | 46,002              | 37,641              | 30,583              |
| Restricted – renovation project/capital reserve       | 1,500,000           | 1,500,000           | 1,500,000           |
| Invested in right-of-use assets, net of liabilities** | ( 282,600)          | ( 147,684)          | ( 58,449)           |
| Invested in capital assets, net of related debt       | <u>6,613,235</u>    | <u>6,748,827</u>    | <u>6,940,061</u>    |
| Total Net Position                                    | <u>\$11,663,764</u> | <u>\$12,162,147</u> | <u>\$11,071,121</u> |

During the fiscal year ended June 30, 2025, the Collaborative's overall net position decreased by approximately \$499,000. Total assets decreased by approximately \$2,608,000 primarily as a result of payment of the prior year credit to the member districts as well as the continued depreciation of assets and amortization of the right-of-use leased assets. Total liabilities decreased by approximately \$791,000, which was primarily the result of the decrease in the year's pay down of lease liability of approximately \$341,000, timing of paying various accounts payable of approximately \$648,000, and a decrease in prepaid tuition of approximately \$510,000, net of an increase of approximately \$770,000 in net OPEB liability due to the updated actuarial calculations. The Collaborative realized a decrease in net position from operations of approximately \$499,000, including issuance of prior year member credits, depreciation on capital assets, right-of-use lease expense and other postemployment benefits expense.

During the fiscal year ended June 30, 2024, the Collaborative's overall net position increased by approximately \$1,091,000. Total assets increased by approximately \$1,555,000 primarily as a result of continued strong operations and oversight increasing the overall cash position of the Collaborative. Total liabilities decreased by approximately \$638,000 which was primarily the result of the decrease in the year's pay down of lease liability of approximately \$387,000 and the adjustment in the OPEB liability of approximately \$588,000 due to the updated actuarial study and \$758,000 as a result of the timing of the payback of credit to the member districts that occurred in fiscal year 2023 but not in fiscal year 2024. Liabilities also increased by \$510,000 in prepaid tuition paid by two of the member districts in comparison to fiscal year 2023. The remaining difference is a result of the timing of payments in

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

comparison to the prior fiscal year relating to the various accrued expenses and payables. The Collaborative realized an increase in net position from operations, including depreciation on capital assets, right-of-use lease expense and other postemployment benefits expense, of approximately \$1,091,000.

**SUMMARY OF ACTIVITIES**

|                                                                                                                     | <u>2025</u>         | <u>2024</u>        | <u>2023</u>       |
|---------------------------------------------------------------------------------------------------------------------|---------------------|--------------------|-------------------|
| Revenues/Gains*                                                                                                     | \$27,413,028        | \$26,075,648       | \$21,984,406      |
| Program Expenses/Losses*                                                                                            | 23,691,319          | 22,030,507         | 19,048,642        |
| Administrative Expenses/Losses*                                                                                     | <u>2,172,402</u>    | <u>2,075,632</u>   | <u>2,137,683</u>  |
| Total Expense*                                                                                                      | <u>25,863,721</u>   | <u>24,106,139</u>  | <u>21,186,325</u> |
| Change in net position, before increase in net retirement health benefit obligation and credits to member districts |                     |                    |                   |
|                                                                                                                     | 1,549,307           | 1,969,509          | 798,081           |
| Increase in net retirement health benefit obligation                                                                | <u>(352,138)</u>    | <u>(573,661)</u>   | <u>(643,839)</u>  |
| Change in net position before credits to member districts                                                           |                     |                    |                   |
|                                                                                                                     | 1,197,169           | 1,395,848          | 154,242           |
| Credits to member districts                                                                                         | <u>( 1,695,822)</u> | <u>( 304,552)</u>  | <u>( 815,609)</u> |
| Change in Net Position                                                                                              | <u>(\$ 498,653)</u> | <u>\$1,091,296</u> | <u>\$ 380,887</u> |

\* Excludes Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, credits to members, and other postemployment benefits funding and expense.

Revenues

In the fiscal year ended June 30, 2025, revenues, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, increased by approximately \$1,337,000 (6%). In the fiscal year ended June 30, 2024, revenues, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, increased by approximately \$4,091,000 (19%). The changes within fiscal years are due primarily to changes in student enrollment in the respective years. Changes in fiscal year 2025 enrollment are primarily a result of expanding of programs and offerings to the area districts.

Operating Expenses

In the fiscal year ended June 30, 2025, operating expenses, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, increased by approximately \$1,758,000, or 8%, compared to the fiscal year ended June 30, 2024. Increases in expenses were primarily a result of increased employee and benefit costs. Personnel costs increased by approximately \$1,728,000 in the fiscal year ended June 30, 2025 as a result for the increase in staffing needs to support operations. There were various other small increases Collaborative wide to support the continued growth.

In the fiscal year ended June 30, 2024, operating expenses, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments, increased by approximately \$2,920,000, or 14%, compared to the fiscal year ended June 30, 2023. Increases in expenses were primarily a result of increased employee and benefit costs, as well as maintenance and occupancy costs. Personnel costs increased by approximately \$2,395,000 in the fiscal year ended June 30, 2024 as a result for the increase in staffing needs to support operations. Maintenance and occupancy costs increased by approximately \$480,000 and training expenses increased by approximately \$20,000. Maintenance and occupancy costs increased as a result of the repairs and updates made across the properties occupied by the Collaborative as well as general increases in utilities. Training expenses saw increases as a result of the increase in new staff employed by the Collaborative as well as the full integration of the SPEDfi program and getting all users acclimated to the system.

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

**Governmental Funds Financial Highlights**

The Collaborative reported a total general fund balance of \$7,614,806, of which \$44,286 was nonspendable and the remaining \$7,570,520 was unassigned. The fund balance increased \$115,632 over the prior fiscal year, as the result of a net operating surplus of \$1,670,454, plus \$141,000 received as trade-in value for vehicles disposed of to be used against the purchase price of new vehicles and decreased by \$1,695,822 of credits issued to member districts. Prepaid expenses decreased by \$2,094, Accounts receivable decreased by \$997,436, primarily due to increased collection efforts. Cash decreased by \$96,661.

Due to strong management, since the year ended June 30, 2013, the Collaborative has returned more than \$13,815,000 from its general fund in the form of cash and tuition credits to its member districts.

**CAPITAL ASSETS AND OTHER OBLIGATIONS**

During the fiscal year ended June 30, 2025 the Collaborative purchased and capitalized eleven vehicles, leasehold improvements and other equipment for use in its program with a total cost of \$791,751. The Collaborative did trade in nine vehicles in fiscal year 2025 totaling a trade-in value of \$141,000.

During the fiscal year ended June 30, 2024, the Collaborative purchased and capitalized eight vehicles, leasehold improvements and other equipment for use in its program with a total cost of \$613,951. The Collaborative did trade in seven vehicles in fiscal year 2024 totaling a trade-in value of \$91,800.

As of June 30, 2025, the balance in the capital reserve fund was \$1,500,000, and fully funded. This fund is considered restricted until utilized for its intended purpose.

**SUBSCRIPTION BASED INFORMATION TECHNOLOGY ARRANGEMENT (SBITA) &  
LEASED ASSETS AND LIABILITIES**

During 2023, the Collaborative implemented GASB Statement No. 96 which requires recording right-of-use SBITA assets and related liabilities for all long-term SBITAs. The Collaborative evaluated its contracts effective July 1, 2024 and determined that the Collaborative had no agreements that exceeded a 12-month period. Therefore there is no value recognized in the financial statements as a result of this standard.

The Collaborative complies with GASB Statement No. 87 which requires right-of-use leased assets and related liabilities for all long-term leases. As of June 30, 2025, the Collaborative recognized right-of-use assets totaling \$4,011,146, net of accumulated amortization of \$1,516,777 and lease liabilities of \$2,776,971 for all leases. See Note D in the notes to the financial statements for additional information on the Collaborative's leases.

**BUDGETARY HIGHLIGHTS**

The Collaborative's annual budget for the fiscal year ended June 30, 2025 was approved by its Board of Directors and then amended on January 9, 2025. For the fiscal year ended June 30, 2025, the Collaborative received operating revenues, excluding on-behalf payments by the Massachusetts Teachers' and State Employees' Retirement Systems, of approximately \$27,266,000 compared to final budgeted revenues of approximately \$27,430,000. The difference between actual revenues received and budgeted revenues is primarily due to lower-than-expected revenues from state contracts. The Collaborative expended operating expenses, excluding on-behalf payments by the Massachusetts Teachers' and State Employees' Retirement Systems, of approximately \$24,804,000 compared to final budgeted expenses of approximately \$26,537,000. The difference between actual expenses incurred and budgeted expenses is primarily from increases relating to the hiring of additional staff that did not occur during the year as planned.

The Collaborative's annual budget for the fiscal year ended June 30, 2024 was approved by its Board of Directors and then amended on January 11, 2024. For the fiscal year ended June 30, 2024, the

**Valley Collaborative**  
Management's Discussion and Analysis  
(unaudited)  
June 30, 2025

Collaborative received operating revenues, excluding on-behalf payments by the Massachusetts Teachers' and State Employees' Retirement Systems, of approximately \$25,963,000 compared to final budgeted revenues of approximately \$24,805,000. The difference between actual revenues received and budgeted revenues is primarily due to higher-than-expected revenues from services the organization provides as well as state contracts. The Collaborative expended operating expenses, excluding on-behalf payments by the Massachusetts Teachers' and State Employees' Retirement Systems, of approximately \$23,198,000 compared to final budgeted expenses of approximately \$23,076,000. The difference between actual expenses incurred and budgeted expenses is primarily from increases relating to the hiring of additional staff.

**CONTACTING THE COLLABORATIVE**

This financial report is designed to provide readers of the financial statement an overview of the Collaborative's financial activities. If you have questions in regard to this report, contact Chris A. Scott, Ph.D., 11 Executive Park Drive, North Billerica, MA 01862, or at 978-528-7800.

**Valley Collaborative**  
Statement of Net Position  
June 30, 2025

**Assets**

|                                                             |                   |
|-------------------------------------------------------------|-------------------|
| Current Assets                                              |                   |
| Cash and cash equivalents                                   | \$ 7,896,935      |
| Accounts receivable, net                                    | 2,822,542         |
| Prepaid expenses and other assets                           | 44,286            |
| Total Current Assets                                        | <u>10,763,763</u> |
| Non-current Assets                                          |                   |
| Right-of-use leased assets, net of accumulated amortization | 2,494,371         |
| Capitalized assets, net                                     | 6,613,235         |
| Total Non-current Assets                                    | <u>9,107,606</u>  |
| Total Assets                                                | <u>19,871,369</u> |

**Deferred Outflows of Resources**

|                                                        |                             |
|--------------------------------------------------------|-----------------------------|
| Deferred Outflows of Resources Related to OPEB         | 947,666                     |
| <b>Total Assets and Deferred Outflows of Resources</b> | <b><u>\$ 20,819,035</u></b> |

**Liabilities, Deferred Inflows and Net Position**

|                                           |                  |
|-------------------------------------------|------------------|
| Current Liabilities                       |                  |
| Accounts payable and accrued liabilities  | \$ 1,098,008     |
| Deferred revenues                         | 500,000          |
| Credits due to member districts           | 4,947            |
| Lease liability, current portion          | 277,229          |
| Total Current Liabilities                 | <u>1,880,184</u> |
| Non-current Liabilities                   |                  |
| Lease liabilities, net of current portion | 2,499,742        |
| Net OPEB liability                        | 2,050,649        |
| Total Non-current Liabilities             | <u>4,550,391</u> |
| Total Liabilities                         | <u>6,430,575</u> |

**Deferred Inflows of Resources**

|                                               |                  |
|-----------------------------------------------|------------------|
| Deferred Inflows of Resources Related to OPEB | <u>2,724,696</u> |
|-----------------------------------------------|------------------|

**Net Position**

|                                                                    |                             |
|--------------------------------------------------------------------|-----------------------------|
| Net Position                                                       |                             |
| Unrestricted                                                       | 3,787,127                   |
| Restricted - contributions and other                               | 46,002                      |
| Restricted - capital reserve fund                                  | 1,500,000                   |
| Invested in right-of-use leased assets, net of related liabilities | (282,600)                   |
| Invested in capital assets, net of related debt                    | 6,613,235                   |
| Total Net Position                                                 | <u>11,663,764</u>           |
| <b>Total Liabilities, Deferred Inflows and Net Position</b>        | <b><u>\$ 20,819,035</u></b> |

See accompanying notes to financial statements and independent auditor's report.



**Valley Collaborative**  
Statement of Activities  
For the year ended June 30, 2025

| Functions/ Programs                            | Expenses             | Program Revenues        |                                                              | Net (Expense)<br>Revenue and<br>Changes in Net<br>Position |
|------------------------------------------------|----------------------|-------------------------|--------------------------------------------------------------|------------------------------------------------------------|
|                                                |                      | Charges for<br>Services | Adult Services<br>and Operating<br>Grants/Contrib-<br>utions |                                                            |
| <b>Governmental Activities:</b>                |                      |                         |                                                              |                                                            |
| Administration                                 | \$ 2,172,402         | \$ -                    | \$ -                                                         | \$ (2,172,402)                                             |
| Education                                      | 22,045,532           | 22,682,559              | 4,501,510                                                    | 5,138,537                                                  |
| Intergovernmental revenue and expense          | 3,365,600            | -                       | 3,365,600                                                    | -                                                          |
| Other postemployment benefits                  | 352,138              | -                       | -                                                            | (352,138)                                                  |
| Interest expense                               | 260,900              | -                       | -                                                            | (260,900)                                                  |
| Capital asset depreciation and<br>amortization | 909,123              | -                       | -                                                            | (909,123)                                                  |
| Right-of-use asset amortization                | 475,764              | -                       | -                                                            | (475,764)                                                  |
| <b>Total Governmental Activities</b>           | <b>\$ 29,581,459</b> | <b>\$ 22,682,559</b>    | <b>\$ 7,867,110</b>                                          | <b>\$ 968,210</b>                                          |
| <b>General Revenue and Other:</b>              |                      |                         |                                                              |                                                            |
| Interest                                       |                      |                         |                                                              | 54,508                                                     |
| Gain on disposal of assets                     |                      |                         |                                                              | 122,780                                                    |
| Other                                          |                      |                         |                                                              | 51,671                                                     |
| Credits to member districts                    |                      |                         |                                                              | (1,695,822)                                                |
| <b>Total General Revenue and Other</b>         |                      |                         |                                                              | <b>(1,466,863)</b>                                         |
| <b>Change in Net Position</b>                  |                      |                         |                                                              | <b>(498,653)</b>                                           |
| <b>Net Position, Beginning of Year</b>         |                      |                         |                                                              | <b>12,162,417</b>                                          |
| <b>Net Position, End of Year</b>               |                      |                         |                                                              | <b>\$ 11,663,764</b>                                       |

See accompanying notes to financial statements and independent auditor's report.

**Valley Collaborative**  
Balance Sheet  
Governmental Funds  
June 30, 2025

|                                            | <b>General Fund</b> | <b>Capital<br/>Reserve<br/>Fund</b> | <b>Nonmajor<br/>Governmental<br/>Funds</b> | <b>Total<br/>Governmental<br/>Funds</b> |
|--------------------------------------------|---------------------|-------------------------------------|--------------------------------------------|-----------------------------------------|
| <b>ASSETS</b>                              |                     |                                     |                                            |                                         |
| Cash and cash equivalents                  | \$ 6,350,933        | \$ 1,500,000                        | \$ 46,002                                  | \$ 7,896,935                            |
| Accounts receivable, net                   | 2,822,542           | -                                   | -                                          | 2,822,542                               |
| Prepaid expenses and other assets          | 44,286              | -                                   | -                                          | 44,286                                  |
| <b>Total Assets</b>                        | <b>\$ 9,217,761</b> | <b>\$ 1,500,000</b>                 | <b>\$ 46,002</b>                           | <b>\$ 10,763,763</b>                    |
| <b>LIABILITIES AND FUND BALANCES</b>       |                     |                                     |                                            |                                         |
| <b>Liabilities:</b>                        |                     |                                     |                                            |                                         |
| Accounts payable and accrued liabilities   | \$ 1,098,008        | \$ -                                | \$ -                                       | \$ 1,098,008                            |
| Deferred revenues                          | 500,000             | -                                   | -                                          | 500,000                                 |
| Credits due to member districts            | 4,947               | -                                   | -                                          | 4,947                                   |
| <b>Total Liabilities</b>                   | <b>1,602,955</b>    | <b>-</b>                            | <b>-</b>                                   | <b>1,602,955</b>                        |
| <b>Fund Balances:</b>                      |                     |                                     |                                            |                                         |
| Nonspendable                               | 44,286              | -                                   | -                                          | 44,286                                  |
| Restricted                                 | -                   | 1,500,000                           | 46,002                                     | 1,546,002                               |
| Committed                                  | -                   | -                                   | -                                          | -                                       |
| Assigned                                   | -                   | -                                   | -                                          | -                                       |
| Unassigned                                 | 7,570,520           | -                                   | -                                          | 7,570,520                               |
| <b>Total Fund Balances</b>                 | <b>7,614,806</b>    | <b>1,500,000</b>                    | <b>46,002</b>                              | <b>9,160,808</b>                        |
| <b>Total Liabilities and Fund Balances</b> | <b>\$ 9,217,761</b> | <b>\$ 1,500,000</b>                 | <b>\$ 46,002</b>                           | <b>\$ 10,763,763</b>                    |

See accompanying notes to financial statements and independent auditor's report.

**Valley Collaborative**  
Reconciliation of the Governmental Funds Balance Sheet to the Statement of Net Position  
June 30, 2025

|                                                |                     |
|------------------------------------------------|---------------------|
| <b>Total fund balances, governmental funds</b> | <b>\$ 9,160,808</b> |
|------------------------------------------------|---------------------|

Amounts reported for governmental activities in the Statement of Net Position are different because:

|                                                                                                                                                                                                                                                     |             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| Deferred inflows relating to the other postemployment benefit obligation is not a current obligation and therefore is not reported in this fund financial statement, but is reported in the government activities of the Statement of Net Position. | (2,724,696) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|

|                                                                                                                                                                       |           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| Right-of-use leased assets, net of accumulated amortization, used in governmental activities are not financial resources and therefore are not reported in the funds. | 2,494,371 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|

|                                                                                                                                                                                                                            |             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| Other postemployment benefit (OPEB) liability is not a current obligation and therefore is not reported in this fund financial statement, but is reported in the governmental activities of the Statement of Net Position. | (2,050,649) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|

|                                                                                                                                                                                  |             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| Long-term lease liabilities related to the right-of-use leased assets is used in governmental activities and are not financial uses and therefore are not reported in the funds. | (2,776,971) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|

|                                                                                                                                                                                                                                                              |         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| Deferred outflows relating to the other postemployment benefit obligation is not a current financial resource and therefore is not reported in this fund financial statement, but is reported in the government activities of the Statement of Net Position. | 947,666 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|

|                                                                                                                                                                                                                                                             |                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| Capital assets, net of related debt, used in governmental activities are not current financial resources and therefore are not reported in this fund financial statement, but are reported in the governmental activities of the Statement of Net Position. | <u>6,613,235</u> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|

|                                                |                                    |
|------------------------------------------------|------------------------------------|
| <b>Net position of governmental activities</b> | <b><u><u>\$ 11,663,764</u></u></b> |
|------------------------------------------------|------------------------------------|

**Valley Collaborative**  
Statement of Revenues, Expenditures and Changes in Fund Balances  
Governmental Funds  
For the Year Ended June 30, 2025

|                                                | <b>General<br/>Fund</b> | <b>Capital<br/>Reserve<br/>Fund</b> | <b>Nonmajor<br/>Governmental<br/>Funds</b> | <b>Total<br/>Governmental<br/>Funds</b> |
|------------------------------------------------|-------------------------|-------------------------------------|--------------------------------------------|-----------------------------------------|
| <b>Revenues:</b>                               |                         |                                     |                                            |                                         |
| Tuition and service revenues                   | \$ 22,682,559           | \$ -                                | \$ -                                       | \$ 22,682,559                           |
| Adult services                                 | 4,477,614               | -                                   | -                                          | 4,477,614                               |
| Grants and contributions                       | -                       | -                                   | 23,896                                     | 23,896                                  |
| Intergovernmental revenue                      | 3,365,600               | -                                   | -                                          | 3,365,600                               |
| Interest                                       | 54,508                  | -                                   | -                                          | 54,508                                  |
| Other                                          | 51,671                  | -                                   | -                                          | 51,671                                  |
| Credits to member districts                    | (1,695,822)             | -                                   | -                                          | (1,695,822)                             |
| <b>Total Revenues</b>                          | <b>28,936,130</b>       | <b>-</b>                            | <b>23,896</b>                              | <b>28,960,026</b>                       |
| <b>Expenditures:</b>                           |                         |                                     |                                            |                                         |
| Administration                                 | 2,156,867               | -                                   | 15,535                                     | 2,172,402                               |
| Program payroll                                | 17,079,070              | -                                   | -                                          | 17,079,070                              |
| Program fringe benefits and payroll taxes      | 2,805,834               | -                                   | -                                          | 2,805,834                               |
| Professional and consulting fees               | 6,594                   | -                                   | -                                          | 6,594                                   |
| Transportation and travel                      | 188,630                 | -                                   | -                                          | 188,630                                 |
| Maintenance and other occupancy                | 597,767                 | -                                   | -                                          | 597,767                                 |
| Telephone, communications and utilities        | 232,881                 | -                                   | -                                          | 232,881                                 |
| Materials, supplies and equipment              | 703,389                 | -                                   | -                                          | 703,389                                 |
| Small business expenses                        | 189,063                 | -                                   | -                                          | 189,063                                 |
| Field trips                                    | 129,692                 | -                                   | -                                          | 129,692                                 |
| Training programs                              | 76,522                  | -                                   | -                                          | 76,522                                  |
| Other                                          | 36,090                  | -                                   | -                                          | 36,090                                  |
| Intergovernmental expense                      | 3,365,600               | -                                   | -                                          | 3,365,600                               |
| Capital outlay, net of debt incurred           | 791,751                 | -                                   | -                                          | 791,751                                 |
| Lease Service:                                 |                         |                                     |                                            |                                         |
| Lease interest                                 | 260,900                 | -                                   | -                                          | 260,900                                 |
| Lease financing principal                      | 340,848                 | -                                   | -                                          | 340,848                                 |
| <b>Total Expenditures</b>                      | <b>28,961,498</b>       | <b>-</b>                            | <b>15,535</b>                              | <b>28,977,033</b>                       |
| Excess (Deficit) of Revenues over Expenditures | (25,368)                | -                                   | 8,361                                      | (17,007)                                |
| <b>Other Financing Sources:</b>                |                         |                                     |                                            |                                         |
| Proceeds from capital asset sale               | 141,000                 | -                                   | -                                          | 141,000                                 |
| <b>Net Change in Fund Balances</b>             | <b>115,632</b>          | <b>-</b>                            | <b>8,361</b>                               | <b>123,993</b>                          |
| <b>Fund Balances, Beginning of Year</b>        | <b>7,499,174</b>        | <b>1,500,000</b>                    | <b>37,641</b>                              | <b>9,036,815</b>                        |
| <b>Fund Balances, End of Year</b>              | <b>\$ 7,614,806</b>     | <b>\$ 1,500,000</b>                 | <b>\$ 46,002</b>                           | <b>\$ 9,160,808</b>                     |

See accompanying notes to financial statements and independent auditor's report.

**Valley Collaborative**  
Reconciliation of the Statement of Revenues, Expenditures and Changes in Fund Balances of  
Governmental Funds to the Statement of Activities  
For the Year Ended June 30, 2025

**Net change in fund balances of total governmental funds** \$ 123,993

Amounts reported for governmental activities in the Statement of Activities are different because:

Governmental funds report outlays for capital assets and right-to-use leased assets as expenditures because such outlays use current financial resources. In contrast, the Statement of Activities reports only a portion of the outlay as expense. The outlay is allocated over the assets' estimated useful lives as depreciation or amortization expense for the period. Governmental funds do not report inflows from assets held to purchase capital assets or finance leased assets because such assets are not considered current financial resources. In contrast, the Statement of Activities does report the inflows as revenue.

|                                                |           |
|------------------------------------------------|-----------|
| Capital outlay purchases, net of debt incurred | 791,751   |
| Depreciation                                   | (909,123) |
| Amortization                                   | (475,764) |
| Gain on disposal of assets                     | 122,780   |

Governmental funds report lease financing payments as expenditures because such outlays use current financial resources. In contrast, the Statement of Activities reports only the current year interest accrued on the liability as expense.

|                           |         |
|---------------------------|---------|
| Lease financing principal | 340,848 |
|---------------------------|---------|

The change in accrual for other postemployment benefits reported in the Statement of Activities does not require the use of current financial resources and, therefore, is not reported as expenditures in the governmental funds.

|                                                            |                  |
|------------------------------------------------------------|------------------|
| Net change in other postemployment benefits (OPEB) accrual | <u>(352,138)</u> |
|------------------------------------------------------------|------------------|

|                                                          |                                   |
|----------------------------------------------------------|-----------------------------------|
| <b>Change in net position of governmental activities</b> | <b><u><u>\$ (498,653)</u></u></b> |
|----------------------------------------------------------|-----------------------------------|

**Valley Collaborative**  
Statement of Fiduciary Net Position  
Retirees' Health Insurance Trust Fund  
June 30, 2025

**Assets**

|              |                     |
|--------------|---------------------|
| Assets       |                     |
| Investments  | \$ 8,282,784        |
| Total Assets | <u>\$ 8,282,784</u> |

**Net Position**

|                                                           |                     |
|-----------------------------------------------------------|---------------------|
| Net Position                                              |                     |
| Net position held in trust for retirees' health insurance | \$ 8,282,784        |
| Total Net Position                                        | <u>\$ 8,282,784</u> |

See accompanying notes to financial statements and independent auditor's report.

**Valley Collaborative**  
Statement of Changes in Fiduciary Net Position  
Retirees' Health Insurance Trust Fund  
For the year ended June 30, 2025

|                                  |                            |
|----------------------------------|----------------------------|
| Additions:                       |                            |
| Contributions                    | \$ -                       |
| Investment gain                  | <u>933,532</u>             |
| Total Additions                  | <u>933,532</u>             |
| Deductions:                      |                            |
| Investment expenses              | <u>25,031</u>              |
| Total Deductions                 | <u>25,031</u>              |
| Change in Net Position           | <u>908,501</u>             |
| Net Position – Beginning of Year | <u>7,374,283</u>           |
| Net Position – End of Year       | <u><u>\$ 8,282,784</u></u> |

See accompanying notes to financial statements and independent auditor's report.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

**Collaborative**

Valley Collaborative (The “Collaborative”) is an educational collaborative of the school districts of Billerica, Chelmsford, Dracut, Groton-Dunstable Regional, Nashoba Valley Technical, North Middlesex Regional, Tewksbury, Tyngsborough, and Westford. The Collaborative is a public entity under the jurisdiction of its member school committees, whose appointees comprise its board of directors. The Collaborative provides high quality academic, therapeutic and vocational services to individuals referred by local school districts and social service agencies.

**Basis of Presentation**

The Collaborative's financial statements are prepared in accordance with accounting principles generally accepted in the United States of America (“GAAP”). The Governmental Accounting Standards Board (“GASB”) is responsible for establishing GAAP for state and local governments through its pronouncements (Statements and Interpretations). The more significant accounting policies established in GAAP and used by the Collaborative are discussed below.

The Collaborative's basic financial statements include both government-wide (reporting the Collaborative as a whole) and fund financial statements (reporting the Collaborative's major funds). Both the government-wide and fund financial statements categorize primary activities as either governmental or business type. Governmental activities are generally financed through intergovernmental assessments or other non-exchange transactions. The Collaborative does not have any activities classified as business type activities.

**Government-wide Statements**

In the government-wide Statement of Net Position, governmental columns are presented on a consolidated basis and are reported on a full accrual, economic resource basis, which recognizes all long-term assets, receivables and deferred outflows of resources, as well as long-term liabilities, deferred inflows of resources and other liabilities reported on a full accrual basis. The Collaborative’s net position is reported in three parts—net investment in capital assets; restricted; and unrestricted. The Collaborative first utilizes restricted resources to finance qualifying activities.

The government-wide Statement of Activities demonstrates the degree to which the direct expenses of a given function or segment are offset by program revenues. Direct expenses are those that are clearly identifiable with a specific function or segment. The Collaborative does allocate indirect expenses to functions in the Statement of Activities if there is a reasonable basis for doing so. Depreciation is reported as one amount, in total, on the Statement of Activities, and is not allocated among the respective functions.

The government-wide focus is more on the sustainability of the Collaborative as an entity and the change in the Collaborative’s net position resulting from the current year’s activities.

**Fund Financial Statements**

The financial transactions of the Collaborative are reported in individual funds in the fund financial statements. Each fund is accounted for by providing a separate set of self-balancing accounts that comprises its assets, liabilities, reserves, fund equity, revenues and expenditures/expenses. The various funds are reported by generic classification within the financial statements.

The emphasis in fund financial statements is on the major funds in either the governmental or business-type activities categories. GASB pronouncements set forth minimum criteria (percentage of the assets and deferred outflows of resources, liabilities and deferred inflows of resources, revenues or expenditures/expenses of either fund category or the governmental and enterprise combined) for the determination of major funds. The Collaborative may electively add funds, as major funds, which have specific community focus. The nonmajor funds are combined in a column in the fund financial statements.



**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – *continued***

The following governmental fund types are used by the Collaborative - the Collaborative does not use proprietary funds:

**Governmental Funds:**

The focus of the governmental funds' measurement (in the fund statements) is upon determination of financial position and changes in financial position (sources, uses, and balances of financial resources) rather than upon net income. The following is a description of the governmental funds of the Collaborative:

*General fund* - is the general operating fund of the Collaborative. It is used to account for all financial resources not accounted for and reported in another fund.

*Capital reserve fund* - used to account for and report financial resources that are restricted, committed, or assigned to be used for the acquisition, construction, or renovation of major capital facilities or equipment.

*Non-major governmental funds* - consist of other special revenue and permanent funds that are aggregated and presented in the non-major governmental funds column on the government funds financial statements.

**Fiduciary Funds:**

Fiduciary Funds are used to report assets held in a trustee or agency capacity for others and therefore are not available to support Collaborative programs. The reporting focus is on net position and changes in net position presented in fiduciary fund financial statements. Since by definition these assets are being held for the benefit of a third party (retirees) and cannot be used to address activities or obligations of the government, these funds are not incorporated into the government-wide statements.

**Measurement Focus and Basis of Accounting**

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

Governmental fund financial statements are reported using the flow of current financial resources measurement focus and the modified accrual basis of accounting. Under the modified accrual basis of accounting, revenues are recognized when susceptible to accrual (i.e., measurable and available). Measurable means the amount of the transaction can be determined and available means collectible within the current period or soon enough thereafter to pay liabilities of the current period. Expenditures are recorded when the related fund liability is incurred, except for unmatured interest on general long-term debt which is recognized when due, and certain compensated absences, claims and judgments which are recognized when the obligations are expected to be liquidated with current expendable available resources.

**Cash and Cash Equivalents**

The Collaborative considers all highly liquid investments with a maturity of three months or less when purchased to be cash equivalents. The Collaborative maintains its uncollateralized cash balances in two financial institutions. The balances in one of the financial institutions are insured by the Federal Deposit Insurance Company up to \$250,000. From time to time, the Collaborative maintains bank account balances in excess of the federally insured limits. The Collaborative also maintains cash and cash equivalents at the Massachusetts Municipal Depository Trust which is collateralized by its underlying assets. At June 30, 2025, the Collaborative's uninsured cash balances, including reconciling items, totaled \$7,646,935. The Collaborative monitors its exposure associated with cash and cash equivalents and has not experienced any losses in such accounts.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – *continued***

**Fair Value Measurements and Investments**

The Collaborative has contributed \$4,854,654 to a public employee retirement trust account with Public Agency Retirement Services as trustee, on behalf of its retirees' health insurance trust fund. The trustee invests the funds in Vanguard mutual funds. As of June 30, 2025, the balance in these investments consisted of the following:

|              | <u>Cost</u> | <u>Fair<br/>Value</u> | <u>Unrealized<br/>Gain</u> |
|--------------|-------------|-----------------------|----------------------------|
| Mutual Funds | \$4,854,654 | \$8,282,784           | \$3,428,130                |

All investments of the Collaborative are measured at fair value, generally based on quoted market prices in accordance with level 1 of the Fair Value Hierarchy established under GASB Statement No. 72, *Fair Value Measurement and Application*.

Net increase in the fair value on investments for the year ended June 30, 2025 was \$908,501. There were no realized gains or losses during the year ended June 30, 2025. Investment fees for the year ended June 30, 2025 were \$25,031.

The Collaborative manages its investments in accordance with state public finance laws that require that all moneys held in the name of the Collaborative, which are not required to be kept liquid for purposes of distribution, shall be invested in such a manner as to require the payment of interest on the money at the highest possible rate reasonably available, taking account of safety, liquidity and yield. The Collaborative has directed a local investment management service to manage the funds as conservatively as possible. However, the investments are still subject to market risk of loss. For an investment, custodial credit risk is the risk that, in the event of the failure of the counterparty, the Collaborative will not be able to recover the value of its investments or collateral securities that are in possession of an outside party. The Collaborative's investments are uninsured, not registered in the name of the Collaborative, and held by the counterparty's trust department or agent but not in the Collaborative's name.

**Operating Revenues and Expenses**

Operating revenues consist primarily of billings to member municipalities or other cities and towns for providing programs and services. The Collaborative also receives approximately 17% of its revenues under social service contracts issued by agencies of the Commonwealth of Massachusetts, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments. Operating expenses include educational costs, administrative expenses and depreciation on capital assets.

**Accounts Receivable**

Accounts receivable consists of all revenues earned at year end and not yet collected. Major receivable balances include tuitions and certain related charges. The Collaborative records its bad debts using the allowance method. As of June 30, 2025, there was an allowance for doubtful accounts of \$27,574.

**Credits Due to Member Districts**

"Credits due to member districts" represent member district credits issued during the fiscal year but not utilized by the district during the fiscal year. The credits are to be applied against future Collaborative invoices or disbursed to the member district and are not considered an agency fund of the Collaborative.

**Property and Equipment**

Property and equipment are capitalized at historical cost. Depreciation is computed on the straight-line method using estimated useful lives of two to five years for websites, computer equipment, furniture, fixtures, vehicles and program equipment and five to ten years for leasehold improvements. The Collaborative has purchased and renovated a building. The building and renovations are depreciated using estimated useful lives of 40 and 20 years, respectively.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – *continued***

**Equity Classifications**

**Government-wide Statements**

Equity is classified as net position and displayed in three components:

*Invested in capital assets, net of related debt* - this component of net position consists of capital assets, net of accumulated depreciation, reduced by the outstanding balances of bonds, notes or other borrowings that are attributable to the acquisition, construction, or improvement of those assets. Deferred outflows of resources and deferred inflows of resources that are attributable to the acquisition, construction, or improvement of those assets or related debt are also included in this component of net position.

*Invested in right-of-use assets, net of liabilities* – this component of net position consists of right-of-use assets, net of accumulated amortization, reduced by the outstanding balances of liabilities that are attributable to the leased assets.

*Restricted* - this component of net position consists of restricted net assets reduced by liabilities and deferred inflows or resources related to those assets. These assets may be restricted by constraints placed on the use either by (1) external groups such as creditors, grantors, contributors, or laws or regulations of other governments; or (2) law through constitutional provisions or enabling legislation.

*Unrestricted* - this component of net position is the net amount of the assets, deferred outflows of resources, liabilities, and deferred inflows of resources that are not included in the determination of net investment in capital assets or the restricted component of net position.

**Fund Financial Statements**

Governmental fund equity is classified as fund balance. Fund balance is further classified based on the extent to which the government is bound to honor constraints on specific purposes for which amounts in the funds can be spent. Fund balances can be classified in the following components:

*Nonspendable fund balance* – consists of amounts that cannot be spent because they are either (a) not in spendable form or (b) legally or contractually required to be maintained intact.

*Restricted fund balance* – consists of amounts upon which constraints have been placed on their use whether (a) externally imposed by creditors (such as through debt covenants), grantors, contributors, or laws or regulations of other governments; (b) imposed by law through constitutional provisions or enabling legislation.

*Committed fund balance* – consists of amounts which can only be used for specific purposes pursuant to constraints imposed by the Collaborative's highest level of decision making, the Board of Directors. Any modification or rescission must also be made by a vote of the Board of Directors.

*Assigned fund balance* – consists of amounts that are constrained by the Collaborative's intent to be used for specific purposes. Intent is expressed by (a) the governing body itself, or (b) a Board of Directors, or official to which the governing body has delegated the authority to assign amounts to be used for specific purposes.

*Unassigned fund balance* – consists of the residual classification for the remaining fund balance. It represents amounts that have not been assigned to other funds and has not been restricted, committed, or assigned to specific purposes.

**Use of Estimates**

Management uses estimates and assumptions in preparing financial statements in accordance with generally accepted accounting principles. Those estimates and assumptions affect the reported amounts of assets and liabilities, and reported revenues and expenses. Actual results could vary from the estimates used.

**Subsequent Events**

Subsequent events have been evaluated through November 20, 2025, which is the date the financial statements were available to be issued.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE B – ACCOUNTS RECEIVABLE**

Accounts receivable consisted of the following as of June 30, 2025:

|                                   |                     |
|-----------------------------------|---------------------|
| Tuition and services to districts | \$ 2,331,944        |
| State contracts                   | <u>518,172</u>      |
|                                   | 2,850,116           |
| Allowance for doubtful accounts   | <u>(27,574)</u>     |
|                                   | <u>\$ 2,822,542</u> |

The Collaborative has established an allowance for doubtful accounts in the amount of \$27,574. The allowance is based on specific identification of probable losses and an estimate of additional losses based on historical experience. Account balances are charged off against the allowance when it is probable the receivable will not be recovered. For the year ended June 30, 2025, the Collaborative recorded no bad debt expense.

**NOTE C – CAPITAL ASSETS**

A summary of depreciable capital assets follows:

|                                 | <u>Buildings &amp;<br/>Improvements</u> | <u>Furniture,<br/>Equipment &amp;<br/>Software</u> | <u>Vehicles</u>    | <u>Total</u>        |
|---------------------------------|-----------------------------------------|----------------------------------------------------|--------------------|---------------------|
| <u>COST</u>                     |                                         |                                                    |                    |                     |
| Balance, July 1, 2024           | \$9,318,041                             | \$ 1,462,400                                       | \$1,858,476        | \$12,638,917        |
| Additions                       | -                                       | 84,880                                             | 706,871            | 791,751             |
| Disposals                       | <u>-</u>                                | <u>-</u>                                           | <u>(279,117)</u>   | <u>(279,117)</u>    |
|                                 | 9,318,041                               | 1,547,280                                          | 2,286,230          | 13,151,551          |
| <u>ACCUMULATED DEPRECIATION</u> |                                         |                                                    |                    |                     |
| Balance, July 1, 2024           | (4,095,631)                             | (1,275,022)                                        | (1,196,937)        | (6,567,590)         |
| Additions                       | (509,318)                               | (84,869)                                           | (314,936)          | (909,123)           |
| Disposals                       | <u>-</u>                                | <u>-</u>                                           | <u>260,897</u>     | <u>260,897</u>      |
|                                 | (4,604,949)                             | (1,359,891)                                        | (1,250,976)        | (7,215,816)         |
| Net, June 30, 2025              | <u>\$ 4,713,092</u>                     | <u>\$ 187,389</u>                                  | <u>\$1,035,254</u> | <u>\$ 5,935,735</u> |

Land in the amount of \$677,500 is not being depreciated. In fiscal 2025, the Collaborative capitalized \$706,871 for vehicles, and \$84,880 for office furniture and equipment. The Collaborative traded in various fully depreciated vehicles during the year ended June 30, 2025, and received \$141,000 of trade-in value toward the purchase of the new vehicles. Depreciation expense of \$909,123 was not allocated to governmental functions. It appears unallocated on the Statement of Activities. The capital reserve for future capital purchases is fully funded.

**NOTE D –LEASE OBLIGATIONS**

The Collaborative leases various classroom and office spaces and office equipment under operating leases. All of its leases qualifying as long-term leases are recorded in accordance with GASB Statement No. 87.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE D –LEASE OBLIGATIONS – *continued***

During fiscal 2017, the Collaborative entered into a building lease for program use at 135 Coburn Road in Tyngsborough, Massachusetts, commencing July 1, 2016 through June 30, 2033 including extensions. The lease requires quarterly rent payments of \$63,988 through June 2028, then it is adjusted to \$31,250 through June 2030, and finally adjusted to \$94,181 through June 2033. During fiscal 2019, the Collaborative entered into a building lease for program and administrative use at 25 Linnell Circle in Billerica, Massachusetts, commencing July 1, 2018 through June 30, 2025 including extension. The lease requires monthly payments of \$13,187 through June 2023, then it is adjusted to \$13,583 through June 2024, and finally adjusted to \$13,991 through June 2025. The lease was not renewed when it expired. During fiscal 2022, the Collaborative entered into a building lease for program use at 11 Executive Park Drive in Billerica, Massachusetts, commencing June 1, 2022 through August 31, 2032. The monthly payments are increased annually by approximately 2% of the prior year. The Coburn Road, Linnell Circle and Executive Park Drive leases represent the total of the right-of-use lease assets and liabilities. Right-of-use assets and initial liabilities are valued using a rate of 6% which represents the Collaborative's incremental borrowing rates at the time the leases and extension were entered into, respectively.

Lease agreements, including modifications, are summarized as follows:

| Description             | Date     | Payment Terms | Payment Amount   | Interest Rate | Total Lease Asset/Liability | Accum. Amort.<br>6/30/2025 | Net Asset<br>6/30/2025 | Liability Balance<br>6/30/2025 |
|-------------------------|----------|---------------|------------------|---------------|-----------------------------|----------------------------|------------------------|--------------------------------|
| 135 Coburn Road**       | 7/1/2016 | 17 years      | \$255,950 (FY25) | 6.00%         | \$2,133,409                 | \$ 638,464                 | \$1,494,945            | \$1,654,281                    |
| 25 Linnell Circle       | 7/1/2022 | 3 years       | \$167,887 (FY25) | 6.00%         | 448,324                     | 448,324                    | -                      | -                              |
| 11 Executive Park Drive | 6/1/2022 | 9.25 years    | \$177,910 (FY25) | 6.00%         | 1,429,413                   | 429,987                    | 999,426                | 1,122,690                      |
| Total Lease Agreements  |          |               |                  |               | \$4,011,146                 | \$1,516,777                | \$2,494,371            | \$2,776,971                    |

\*\*Lease was modified during FY2022.

Annual requirements to amortize long-term obligations and related interest are as follows:

| Year Ending | Principal   | Interest  | Total       |
|-------------|-------------|-----------|-------------|
| 30-Jun      |             |           |             |
| 2026        | \$277,229   | \$160,361 | \$437,590   |
| 2027        | 298,285     | 143,155   | 441,440     |
| 2028        | 320,764     | 124,646   | 445,410     |
| 2029        | 210,811     | 107,739   | 318,550     |
| 2030        | 228,140     | 94,620    | 322,760     |
| Thereafter  | 1,441,742   | 132,180   | 1,573,922   |
|             | \$2,776,971 | \$762,701 | \$3,539,672 |

For the year ended June 30, 2025, total amortization expense of leased assets was \$475,764 and total interest expense on lease liabilities was \$260,900.

**NOTE E – MASSACHUSETTS TEACHERS' AND STATE EMPLOYEES' RETIREE SYSTEMS**

Plan Descriptions:

The Collaborative's employees participate in the Massachusetts Teachers' (MTRS) or State Employee' Retirement System (MSERS), statewide cost-sharing multi-employer defined benefit plans public employee retirement systems (PERS) covering all employees of local school districts within the Commonwealth of Massachusetts. The retirement systems issue publicly available annual reports that includes financial statements and required supplementary information, which may be obtained by writing to Public Employee Retirement Administration Commission (PERAC), 5 Middlesex Avenue, Suite 304, Somerville, Massachusetts, 02145.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE E – MASSACHUSETTS TEACHERS’ AND STATE EMPLOYEES’ RETIREE SYSTEMS –  
*continued***

Benefits Provided:

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

Members become vested after ten years of creditable service. A superannuation retirement allowance may be received upon the completion of twenty years of creditable service or upon reaching the age of 55 with ten years of service. Normal retirement for most employees occurs at age 65; for certain hazardous duty and public safety positions, normal retirement is at age 55. Most employees who joined the system after April 1, 2012 cannot retire prior to age 60.

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

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

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

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

Contributions:

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

| <u>Hire Date</u>         | <u>% of Compensation</u>                                       |
|--------------------------|----------------------------------------------------------------|
| Prior to 1975.....       | 5% of regular compensation                                     |
| 1975 - 1983.....         | 7% of regular compensation                                     |
| 1984 to 6/30/1996.....   | 8% of regular compensation                                     |
| 7/1/1996 to present..... | 9% of regular compensation                                     |
| 1979 to present.....     | An additional 2% of regular compensation in excess of \$30,000 |

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE E – MASSACHUSETTS TEACHERS’ AND STATE EMPLOYEES’ RETIREE SYSTEMS –  
*continued***

Educational collaboratives contribute amounts equal to the normal cost of employees’ benefits participating in MSERS at a rate established by the Public Employees’ Retirement Administration Commission (PERAC), currently 6.1% of covered payroll. Legally, the collaboratives are only responsible for contributing the annual normal cost of their employees’ benefits (i.e., the present value of the benefits earned by those employees in any given year) and are not legally responsible for the past service cost attributable to those employees or previously retired employees of the collaboratives. During fiscal year 2025, the Collaborative’s contributions on behalf of employees totaled \$533,714.

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

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

The Commonwealth is a nonemployer contributor in MTRS and is required by statute to make all actuarially determined employer contributions on behalf of the member employers participating in MTRS. Therefore, the Collaborative is considered to be in a 100% special funding situation as defined by GASB Statement No. 68, *Accounting and Financial Reporting for Pensions* and the Commonwealth is a nonemployer contributing entity in under both MSERS and MTRS. Since the employers do not contribute directly to each system beyond the MSERS annual normal cost, there is no net pension liability to recognize. However, the notes to the financial statements must disclose the portion of the nonemployer contributing entities’ share of the collective net pension liability that is associated with the employer. In addition, the Collaborative must recognize its portion of the collective pension expense as both a revenue and pension expense.

The nonemployer contributing entities’ share of the collective net pension liability that is associated with the Collaborative was measured as of June 30, 2024 and was \$15,733,379 and \$21,098,472 under MSERS and MTRS, respectively. In fiscal 2025, the Collaborative recognized revenue and related expense of \$1,624,098 (under GASB Statement No. 68) for its portion of the collective pension expense under MSERS. In fiscal 2025, the Collaborative recognized revenue and related expense of \$1,741,502 (under GASB Statement No. 68), for its portion of the collective pension expense under MTRS. These amounts are recorded as Intergovernmental revenue and expense in the financial statements.

**NOTE F – COMPENSATED ABSENCES**

The Collaborative allows eligible employees to carryover unused vacation time up to 10 days per year and to accrue a maximum of 20 days total. At the end of the fiscal year, any unused vacation time in excess of the above amounts is forfeited. The Collaborative’s vacation accrual for the year ended June 30, 2025 was \$122,982.

**NOTE G – RISK MANAGEMENT**

The Collaborative is exposed to various risks of loss relating to torts, theft or damage of, and destruction of assets; error and omissions; injuries to employees; and natural disasters. The Collaborative has obtained a variety of commercial liability insurance policies that pass the risk of loss listed above to independent third parties. Management believes such coverage is sufficient to preclude any significant uninsured losses to the Collaborative. Settled claims have not exceeded the insurance coverage in any of the past three fiscal years.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE G – RISK MANAGEMENT – *continued***

The Collaborative offers eligible participants access to various health and life insurance. Payment, in the form of premiums, is generally made monthly. The payments are funded in part from the Collaborative and payroll withholdings from active employee participants or direct payments from certain other eligible participants. In general, the Collaborative pays 75-80% of the cost of health insurance and 100% of the cost of life insurance for those participants that qualify.

**NOTE H – COMMITMENTS AND CONTINGENCIES**

The Collaborative participates in state and federal contracts, which are governed by various rules and regulations of the agencies. Costs charged to the respective programs are subject to audit and adjustment by agencies; therefore, to the extent that the Collaborative has not complied with the rules and regulations governing the refunds of any money received may be required and the collectability of any related receivable at June 30, 2025 may be impaired. In the opinion of the Collaborative, there are no significant contingent liabilities relating to compliance with the rules and regulations governing the respective contracts; therefore, no provision has been recorded in the accompanying financial statements for such contingencies.

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN**

The Collaborative follows the provisions of GASB Statement No. 75, “Accounting and Financial Reporting for Postemployment Benefits other than Pensions.”

Description

At the board meeting on June 18, 2015, the Collaborative’s board members implemented a postemployment health care plan and voted to create a trust fund for related retiree health benefits to take effect July 1, 2015. The trust fund is held for the benefit of a third party (retiree health insurance participants) and cannot be used to address activities or obligations of the Collaborative, therefore these funds are not incorporated into the government-wide financial statements. All funds of the trust are held at Public Agency Retirement Services and are held in mutual funds. The trust is irrevocable and is exempt from federal and state income taxes under Internal Revenue Code Section 115. The sole purpose of the trust is to provide funds to pay postemployment healthcare benefits to qualified retirees. The plan has the retirees pay for 20% of the premiums for the medical insurance. As a result of establishing the trust, the Collaborative’s board members voted to initially transfer \$3,150,000 to fund the trust. During the fiscal year ended June 30, 2025 the Collaborative did not transfer any additional funds to the trust. The Collaborative has transferred \$4,854,654 to date to the trust account.

An employee hired before April 2, 2012 shall become eligible to retire under these programs upon meeting the following conditions:

- i. Completion of 10 years of creditable service at the Collaborative
- ii. And attainment of age 55 as an active member
- iii. Or completion of 20 years of service at the Collaborative, regardless of age

An employee hired after April 2, 2012 shall become eligible to retire under these programs upon meeting the following conditions:

- i. Completion of 10 years of creditable service at the Collaborative
- ii. And attainment of age 60 as an active member

Funding Policy

The contribution requirements of plan members and the Collaborative are established and may be amended through Collaborative ordinances. For the period ending on the June 30, 2025 Measurement Date, total Collaborative premiums plus implicit costs for the retiree medical program were \$109,715. The Collaborative also contributed \$0 to the OPEB Trust for a total contribution during the measurement period of \$109,715 to be reported in the financial statements for the fiscal year ending June 30, 2025.



**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN – *continued***

Investment Policy

The long-term rate of return on assets developed based on the Collaborative Investment Policy is 5.86%. The rate is comprised of a 3.73% real rate of return and 2.50% inflation assumption, net of 0.37% investment expense.

Actuarially Determined Contribution (ADC)

The Collaborative's Actuarially Determined Contribution (ADC) is an amount actuarially determined in accordance with the parameters of GASB Statement No. 74/75 which is composed of the service cost and an amortization of the unfunded liability. For FY2025 and future years a 30-year amortization increasing by 3.00% per year of the Collaborative's unfunded liability for the purpose of calculating ADC. The following table shows the components of the Collaborative's annual ADC for the fiscal year and the amount actually contributed to the plan:

| <b>Actuarially Determined Contribution - Deficiency / (Excess)</b>       |  | <b>June 30, 2025</b> |
|--------------------------------------------------------------------------|--|----------------------|
| I. Service Cost                                                          |  | \$ 802,329           |
| II. 30-year level dollar amortization of NOL                             |  | 91,555               |
| III. Actuarial Determined Contribution [I. + II.]                        |  | 893,884              |
| IV. Contributions in relation to the actuarially determined contribution |  | (109,715)            |
| V. Contribution deficiency / (excess) [III. + IV.]                       |  | <u>\$ 784,169</u>    |
| Covered employee payroll                                                 |  | \$17,432,244         |
| Contribution as a % of covered employee payroll                          |  | 0.63%                |
| Discount Rate                                                            |  | 5.22%                |
| Money Weighted Rate of Return                                            |  | 12.32%               |

OPEB Liability and OPEB Expense

|                                                                                 | <b>Fiscal Year Ended June 30, 2025</b>              |                   |
|---------------------------------------------------------------------------------|-----------------------------------------------------|-------------------|
|                                                                                 | <b>Collaborative<br/>Employees and<br/>Retirees</b> | <b>Total</b>      |
| I. Total OPEB Liability as of June 30, 2023                                     | \$10,333,433                                        | \$10,333,433      |
| II. Fiduciary Net Position as of June 30, 2023                                  | <u>8,282,784</u>                                    | <u>8,282,784</u>  |
| III. Net OPEB Liability (Asset) as of June 30, 2023 [I.-II.]                    | 2,050,649                                           | 2,050,649         |
| IV. Service Cost                                                                | 802,329                                             | 802,329           |
| V. Interest on Total OPEB Liability (Asset), Service Cost, and Benefit Payments | 512,464                                             | 512,464           |
| VI. Projected Earnings on OPEB Plan Investments                                 | (456,799)                                           | (456,799)         |
| VII. Net Recognition of Deferred (Inflows)/Outflows                             | <u>(396,141)</u>                                    | <u>(396,141)</u>  |
| VIII. Financial Statement Expense [IV.+V.+VI.+VII.]                             | 461,853                                             | 461,853           |
| IX. Employer Share of Costs                                                     | (109,715)                                           | (109,715)         |
| X. Employer (Payments) Withdrawals to/from OPEB Trust                           | -                                                   | -                 |
| XI. Total Employer Contribution [IX.+X.]                                        | <u>( 109,715)</u>                                   | <u>( 109,715)</u> |
| XII. Net OPEB Expense [VIII.+XI.]                                               | <u>\$ 352,138</u>                                   | <u>\$ 352,138</u> |

Effect of 1% Change in Healthcare Trend

In the event that healthcare trend rates were 1% higher than forecast and employee contributions were to increase at the forecast rates, the Total OPEB Liability as of the June 30, 2025 Measurement Date would increase to \$15,259,430 and Net OPEB Liability would increase to \$4,925,997. If such healthcare trend rates were 1% less than forecast and employee contributions were to increase at the forecast rate, the Total OPEB Liability would decrease to \$10,281,060 and the Net OPEB Liability would decrease to (\$52,373).

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN – *continued***

Effect of 1% Change in Discount Rates

As of the June 30, 2025 Measurement Date, if the discount rate were 1% higher than what was used in this valuation, the Total OPEB Liability would decrease to \$10,053,613 and the Net OPEB Liability would decrease to \$279,820. If the discount rate were 1% lower than was used in this valuation, the Total OPEB Liability would increase to \$14,680,045 and the Net OPEB Liability would increase to \$4,346,612.

Actuarial Methods and Assumptions

Projections of benefits for financial reporting purposes are based on the substantive plan (the plan as understood by the employer and plan members) and include the types of benefits provided at the time of each valuation and the historical pattern of sharing of benefits costs between the employer and plan members to that point. The actuarial methods and assumptions used include techniques that are designed to reduce the effects of short-term volatility in actuarial accrued liabilities and the actuarial value of assets, consistent with the long-term perspective of the calculations.

|                                |                                    |
|--------------------------------|------------------------------------|
| Actuarial Cost Method:         | Individual Entry Age Normal        |
| Discount Rate:                 | 5.22% per annum (previously 5.45%) |
| General Inflation Assumption:  | 2.50% per annum                    |
| Annual Compensation Increases: | 3.00% per annum                    |
| Actuarial Value of Assets:     | Market Value                       |

Recognition of OPEB Trust Assets

The state of Massachusetts has passed legislation allowing municipal entities to establish a Trust for Other Postemployment Benefits (“OPEB”) under M.G.L. Chapter 32B, Section 20 for purposes of accumulating assets to pre-fund the liabilities under GASB 75. This legislation was amended effective November 9, 2016 to clarify who may adopt such a Trust and provide guidance on the ongoing operation of such a Trust. The Collaborative has established an irrevocable trust for the purposes of prefunding liabilities under GASB 74/75.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN – *continued***

Changes in Net OPEB Liability

| <b>Changes in Net OPEB Liability</b>                                       |                                 |                                            |                               |
|----------------------------------------------------------------------------|---------------------------------|--------------------------------------------|-------------------------------|
|                                                                            | <b>Increase (Decrease)</b>      |                                            |                               |
|                                                                            | <b>Total OPEB<br/>Liability</b> | <b>Plan<br/>Fiduciary Net<br/>Position</b> | <b>Net OPEB<br/>Liability</b> |
| <b>I. Balances at June 30, 2024</b>                                        | \$ 8,654,814                    | \$ 7,374,283                               | \$ 1,280,531                  |
| <b>II. Prior Period Adjustment</b>                                         | -                               | -                                          | -                             |
| <b>III. Balances for June 30, 2024 with Adjustment [I.+II.]</b>            | 8,654,814                       | 7,374,283                                  | 1,280,531                     |
| <b>Changes for the year:</b>                                               |                                 |                                            |                               |
| IV. Service Cost                                                           | 802,329                         | -                                          | 802,329                       |
| V. Interest on Total OPEB Liability, Service Cost, and<br>Benefit Payments | 512,464                         | -                                          | 512,464                       |
| VI. Changes in Benefit Terms*                                              | -                               | -                                          | -                             |
| VII. Changes in assumptions**                                              | 90,322                          | -                                          | 90,322                        |
| VIII. Differences between actual and expected<br>experience**              | 383,219                         | -                                          | 383,219                       |
| IX. Net Investment Income                                                  | -                               | 908,501                                    | (908,501)                     |
| X. Employer Contributions (Withdrawals) to/from Trust                      | -                               | 109,715                                    | (109,715)                     |
| XI. Benefit payments withdrawn from Trust                                  | -                               | (109,715)                                  | 109,715                       |
| XII. Benefit payments excluding Implicit Cost                              | (85,145)                        | -                                          | (85,145)                      |
| XIII. Implicit Cost Amount                                                 | (24,570)                        | -                                          | (24,570)                      |
| XIV. Total Benefit payments including Implicit Cost<br>[XII.+XIII.]        | (109,715)                       | -                                          | (109,715)                     |
| XV. Administrative and Other Charges                                       | -                               | -                                          | -                             |
| XVI. Other Charges                                                         | -                               | -                                          | -                             |
| <b>XVII. Net Changes</b>                                                   |                                 |                                            |                               |
| <b>[IV.+V.+VI.+VII.+VIII.+IX.+X.+XI.+XIV.+XV.+XVI.]</b>                    | \$ 1,678,619                    | \$ 908,501                                 | \$ 770,118                    |
| <b>XVI. Balances at June 30, 2025 [III.+XVII.]</b>                         | \$ 10,333,433                   | \$ 8,282,784                               | \$ 2,050,649                  |

\* Recognized immediately

Deferred Inflows/Outflows

| <b>Deferred (Inflows)/Outflows in OPEB Expense arising from the recognition of the effects of differences between expected &amp; actual experience</b> |                                                                         |                                           |                              |             |             |             |             |             |             |                         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|-------------------------------------------|------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------------------|
| <b>Fiscal</b>                                                                                                                                          | <b>Differences<br/>between actual<br/>&amp; expected<br/>experience</b> | <b>Recognition<br/>Period<br/>(years)</b> | <b>Remaining<br/>Balance</b> | <b>2025</b> | <b>2026</b> | <b>2027</b> | <b>2028</b> | <b>2029</b> | <b>2030</b> | <b>There-<br/>after</b> |
| 2019                                                                                                                                                   | (1,703,175)                                                             | 7.00                                      | -                            | (243,309)   | -           | -           | -           | -           | -           | -                       |
| 2020                                                                                                                                                   | (469)                                                                   | 7.00                                      | (67)                         | (67)        | (67)        | -           | -           | -           | -           | -                       |
| 2021                                                                                                                                                   | (1,125,612)                                                             | 7.00                                      | (321,602)                    | (160,802)   | (160,802)   | (160,800)   | -           | -           | -           | -                       |
| 2022                                                                                                                                                   | -                                                                       | 7.00                                      | -                            | -           | -           | -           | -           | -           | -           | -                       |
| 2023                                                                                                                                                   | (1,278,180)                                                             | 7.00                                      | (730,389)                    | (182,597)   | (182,597)   | (182,597)   | (182,597)   | (182,598)   | -           | -                       |
| 2024                                                                                                                                                   | -                                                                       | 7.00                                      | -                            | -           | -           | -           | -           | -           | -           | -                       |
| 2025                                                                                                                                                   | 383,219                                                                 | 7.00                                      | 328,474                      | 54,745      | 54,745      | 54,745      | 54,745      | 54,745      | 54,745      | 54,749                  |
| Total Remaining Balance                                                                                                                                |                                                                         |                                           | (723,584)                    |             |             |             |             |             |             |                         |
| Net increase (decrease) in OPEB Expense                                                                                                                |                                                                         |                                           |                              | (532,030)   | (288,721)   | (288,652)   | (127,852)   | (127,853)   | 54,745      | 54,749                  |

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE I – POSTEMPLOYMENT HEALTHCARE PLAN – *continued***

| Deferred (Inflows)/Outflows in OPEB Expense arising from the recognition of the effects of changes in assumptions |                                                  |                            |                   |           |           |           |           |           |           |             |
|-------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|----------------------------|-------------------|-----------|-----------|-----------|-----------|-----------|-----------|-------------|
| Fiscal                                                                                                            | Differences between actual & expected experience | Recognition Period (years) | Remaining Balance | 2025      | 2026      | 2027      | 2028      | 2029      | 2030      | There-after |
| 2019                                                                                                              | 2,659,477                                        | 7.00                       | -                 | 379,927   | -         | -         | -         | -         | -         | -           |
| 2020                                                                                                              | -                                                | 7.00                       | -                 | -         | -         | -         | -         | -         | -         | -           |
| 2021                                                                                                              | 467,416                                          | 7.00                       | 133,546           | 66,774    | 66,774    | 66,772    | -         | -         | -         | -           |
| 2022                                                                                                              | (1,136,144)                                      | 7.00                       | (486,920)         | (162,306) | (162,306) | (162,306) | (162,308) | -         | -         | -           |
| 2023                                                                                                              | 714,395                                          | 7.00                       | 408,227           | 102,056   | 102,056   | 102,056   | 102,056   | 102,059   | -         | -           |
| 2024                                                                                                              | (1,045,075)                                      | 7.00                       | (746,483)         | (149,296) | (149,296) | (149,296) | (149,296) | (149,296) | (149,299) | -           |
| 2025                                                                                                              | 90,322                                           | 7.00                       | 77,419            | 12,903    | 12,903    | 12,903    | 12,903    | 12,903    | 12,903    | 12,904      |
| Total Remaining Balance                                                                                           |                                                  |                            | (614,211)         |           |           |           |           |           |           |             |
| Net increase (decrease) in OPEB Expense                                                                           |                                                  |                            |                   | 250,058   | (129,869) | (129,871) | (196,645) | (34,334)  | (136,396) | 12,904      |

| Deferred (Inflows)/Outflows in OPEB Expense arising from the recognition of differences between projected & actual earnings on OPEB plan investments |                                                  |                            |                   |           |          |           |           |          |      |             |
|------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|----------------------------|-------------------|-----------|----------|-----------|-----------|----------|------|-------------|
| Fiscal                                                                                                                                               | Differences between actual & expected experience | Recognition Period (years) | Remaining Balance | 2025      | 2026     | 2027      | 2028      | 2029     | 2030 | There-after |
| 2019                                                                                                                                                 | (30,347)                                         | 5.00                       | -                 | -         | -        | -         | -         | -        | -    | -           |
| 2020                                                                                                                                                 | 18,043                                           | 5.00                       | -                 | -         | -        | -         | -         | -        | -    | -           |
| 2021                                                                                                                                                 | (755,533)                                        | 5.00                       | -                 | (151,105) | -        | -         | -         | -        | -    | -           |
| 2022                                                                                                                                                 | 1,236,152                                        | 5.00                       | 247,232           | 247,230   | 247,232  | -         | -         | -        | -    | -           |
| 2023                                                                                                                                                 | (173,824)                                        | 5.00                       | (69,532)          | (34,764)  | (34,764) | (34,768)  | -         | -        | -    | -           |
| 2024                                                                                                                                                 | (425,953)                                        | 5.00                       | (255,573)         | (85,190)  | (85,190) | (85,190)  | (85,193)  | -        | -    | -           |
| 2025                                                                                                                                                 | (451,702)                                        | 5.00                       | (361,362)         | (90,340)  | (90,340) | (90,340)  | (90,340)  | (90,342) | -    | -           |
| Total Remaining Balance                                                                                                                              |                                                  |                            | (439,235)         |           |          |           |           |          |      |             |
| Net increase (decrease) in OPEB Expense                                                                                                              |                                                  |                            |                   | (114,169) | 36,938   | (210,298) | (175,533) | (90,342) | -    | -           |

**NOTE J – TAX POSITION**

The primary tax positions made by the Collaborative are the existence of Unrelated Business Income Tax and the Collaborative's status as an exempt organization under the Internal Revenue Code. The Collaborative currently evaluates all tax positions, and makes determinations regarding the likelihood of those positions being upheld under review. For the years presented, and as a result of adoption, the Collaborative has not recognized any tax benefits or loss contingencies for uncertain tax positions based on its evaluations. The Collaborative is not currently under examination by any taxing jurisdiction. As a Chapter 40 governmental entity, the Collaborative is exempt from filing certain non-profit filings and, accordingly, there are no returns currently open for examination.

**NOTE K – COMMONWEALTH OF MASSACHUSETTS SURPLUS REVENUE RETENTION (OSD)**

The excess (deficiency) of revenue received from departments of the Commonwealth of Massachusetts is the amount in accordance with the Commonwealth of Massachusetts Not-For-Profit Provider Surplus Revenue Retention Policy, pursuant to 808CMR 1.19(3) of the Pricing, Reporting, and Auditing for Social Programs, which allows a provider to retain, for future use, a portion of annual net surplus. Net surplus from the revenues and expenses with services provided to purchasing agencies, which are subject to 808CMR 1.00, may not exceed 20% of the provider's revenues derived from contracts with state departments annually. For fiscal 2016 and beyond, there is no limit on the cumulative amount of the provider's net surplus. For the year ended June 30, 2025, the Collaborative had no surplus revenue from contracts with state departments.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE L – DISCLOSURES REQUIRED UNDER MASSACHUSETTS GENERAL LAW C.40 § 4E**

Names, duties and total compensation of the five most highly compensated employees

The five highest compensated employees of the Collaborative during fiscal year 2025 were as follows:

| <u>Name</u>         | <u>Title</u>                | <u>Total Compensation</u> |
|---------------------|-----------------------------|---------------------------|
| Chris A. Scott, PhD | Executive Director          | \$247,526                 |
| Joia Mercurio       | Deputy Director             | \$149,915                 |
| Nicole Noska        | Principal                   | \$145,196                 |
| Kari Ann Morrin     | Director of Human Resources | \$140,964                 |
| Matthew Gentile     | Director of DDS Services    | \$135,806                 |

Executive Director:

Responsible for the proper fiscal management of Collaborative Programs. Administer and coordinate all programs and services offered by the Collaborative. Develop and propose an annual budget to the Board of Directors. Ensure Collaborative is operating within and in compliance with federal and state laws.

Deputy Director:

Responsible for supervising the effective and efficient implementation of programs and the payroll department. Assist in the creation of required state reports, records and other documentation. Keep the executive director informed about what is happening at the program level.

Director Human Resources:

Responsible for administering personnel programs and policies for the Collaborative and ensuring that proper practices are being followed. Handle all aspects with the hiring process. Manage the day-to-day human resource functions.

Principal:

Responsible to ensure program curriculum is aligned with Massachusetts Curriculum Frameworks. Other responsibilities include, ensure safety and structure of program, coordination and review all IEPs, schedule and participate in IEP meetings, communicate with parents, LEAs and outside agencies, and interview student referrals.

Director of DDS Services:

Responsible for coordinating services and activities relating to vocational preparedness and program enhancement while being the liaison between the Collaborative and local business partners. Other responsibilities include supervising direct support and job development staff and overseeing state agency contracts.

Amounts expended on services for individuals aged 22 years and older

Total direct costs incurred by the Collaborative in its over 21 programs, funded in part by contracts with agencies of the Commonwealth of Massachusetts, totaled \$3,902,632 for the year ended June 30, 2025, excluding Massachusetts Teachers' and State Employees' Retirement Systems "on-behalf" payments.

Amounts expended on administration and overhead

Administrative expenses of \$2,172,402 for the year ended June 30, 2025, include all costs that cannot be directly or reasonably applied to a program of the Collaborative. Administrative expenses include salaries, related benefits and payroll taxes, associated with the Collaborative's administrative office (i.e., Executive Director, finance staff, human resources, etc.), as well as other costs associated with maintaining that office (i.e. occupancy, supplies, etc.). The Collaborative directly applies salaries, where appropriate, to its programs and allocates related employee benefits and taxes to those programs. Occupancy, supplies, maintenance and any other cost that can be directly applied, or reasonably allocated, are reported under program expense.

Accounts held by the Collaborative that may be spent at the discretion of another person or entity

The Collaborative does not hold any accounts that may be spent at the discretion of another person or entity.

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE L – DISCLOSURES REQUIRED UNDER MASSACHUSETTS GENERAL LAW C.40 § 4E -  
continued**

Transactions between the Collaborative and any related for-profit or non-profit organization

Other than the leases described below, the Collaborative had no transactions between the Collaborative and any related for-profit or non-profit organization.

Transactions or contracts related to purchase, sale, rental or lease of real property

Transactions or contracts related to the purchase, sale, rental, or lease of real property are described in Notes C and D to the financial statements. The Collaborative leases classroom and other program space within Tyngsborough, a member district. For the year ended June 30, 2025, rent expense under this lease was \$255,950. During the year ended June 30, 2020, the Collaborative paid \$1,000,000 for improvements to the leased space within Tyngsborough. The improvements are depreciated in the government wide financial statements over the lease term.

Annual determination and disclosure of cumulative surplus

| Cumulative Surplus Calculation – FY24 |                                                      |                           |               | Page(s) in<br>financial<br>statements |
|---------------------------------------|------------------------------------------------------|---------------------------|---------------|---------------------------------------|
| (A)                                   | <b>Surplus as of June 30, 2024</b>                   | \$                        | 7,499,174     | (A) <b>p. 12</b>                      |
|                                       | <i>(Breakdown of use of 2024 surplus)</i>            |                           |               |                                       |
|                                       | B(1) used to support the FY25 budget                 | \$                        | -             |                                       |
|                                       | B(2) issued as credits to member districts           | \$                        | 1,695,822     |                                       |
|                                       | B(3) issued as a check(s) to member district(s)      | \$                        | -             |                                       |
|                                       | B(4) deposited to a restricted account(s)            | \$                        | -             |                                       |
| (B)                                   | <b>Board voted uses of surplus funds during FY25</b> | <i>(total from B1:B4)</i> | \$ 1,695,822  | (B) <b>p. 12</b>                      |
| (C)                                   | <b>Unexpended FY25 General Funds</b>                 |                           | \$ 1,811,454  | (C) <b>p. 12</b>                      |
| (D)                                   | Cumulative Surplus as of June 30, 2025               | (A) - (B) + (C) = (D)     | \$ 7,614,806  | (D) <b>p. 12</b>                      |
| (E)                                   | <b>FY25 Total General Fund Expenditures*</b>         |                           | \$ 25,707,009 | (E) <b>p. 12</b>                      |
| (F)                                   | Cumulative Surplus Percentage                        | (D) ÷ (E)                 | <b>29.62%</b> | (F)                                   |

**CUMULATIVE SURPLUS REDUCTION**  
**Allowable uses of surplus - in excess of the 25% limit**

|     |                                                               |                     |           |           |
|-----|---------------------------------------------------------------|---------------------|-----------|-----------|
| (G) | Cumulative surplus as of June 30, 2025                        | \$                  | 7,614,806 |           |
|     |                                                               | 25% limit (allowed) | \$        | 6,426,752 |
| (H) | Cumulative Surplus <b>REDUCTIONS</b>                          |                     |           |           |
|     | (H)1 Credited to member districts for tuition, services, etc. | \$                  | 1,200,000 | ***       |
|     | (H)2 Deposited to an established trust and/or reserve fund    | \$                  | -         |           |
|     | (H)3 Returned (check) to school districts/towns               | \$                  | -         |           |
|     | <b>Total Reductions</b>                                       | \$                  | 1,200,000 |           |

**FY25 Cumulative Surplus Percentage after Reductions** **24.95%**

**Valley Collaborative**  
Notes to Financial Statements  
June 30, 2025

**NOTE L – DISCLOSURES REQUIRED UNDER MASSACHUSETTS GENERAL LAW C.40 § 4E -  
*continued***

\*Reconciliation of Total General Fund Expenditures to the Statement of Revenues, Expenditures and Changes in Fund Balances – Governmental Funds on page 12:

|                                                        |                     |
|--------------------------------------------------------|---------------------|
| Total Expenditures:                                    | \$28,961,498        |
| OPEB Obligation Funding:                               | -                   |
| Intergovernmental Expense:                             | <u>(3,365,600)</u>  |
|                                                        | 25,595,898          |
| FY25 depreciation on leasehold improvements:           | <u>111,111**</u>    |
| Total General Fund Expenditures per calculation above: | <u>\$25,707,009</u> |

\*\*During the year ended June 30, 2020, the Collaborative paid for \$1,000,000 of improvements to a leased facility. The payment was approved and budgeted by the Collaborative’s board of directors. However, because this was a special one-time payment, the Collaborative requested clarification from the Department of Elementary and Secondary Education (“DESE”) regarding treatment of the expenditure. DESE requested that the \$1,000,000 capital expenditure be treated as an expenditure over the remaining lease term of 9 years for purposes of determining the cumulative surplus funds in excess of 25% of general fund expenditures. The annual amount to be reported as an expenditure is \$111,111.

\*\*\*Prior to June 30, 2025, the Collaborative’s board of directors voted to return \$1,000,000 of cumulative general fund surplus to member districts. During the November 20, 2025 board meeting, the Collaborative elected to return an additional \$200,000 to the member districts to comply with the 25% cumulative surplus allowance.

**Valley Collaborative**  
Statement of Revenues, Expenditures and Changes in Fund Balance  
of the General Fund - Budget to Actual  
For the year ended June 30, 2025

|                                      | <b>Original<br/>Budget</b> | <b>Final Budget</b> | <b>Actual<br/>Amounts</b> | <b>Variance with<br/>Final Budget<br/>Favorable<br/>(Unfavorable)</b> |
|--------------------------------------|----------------------------|---------------------|---------------------------|-----------------------------------------------------------------------|
| Revenues:                            |                            |                     |                           |                                                                       |
| Tuition and services                 | \$ 19,200,000              | \$ 21,800,000       | \$ 22,682,559             | \$ 882,559                                                            |
| Adult services                       | 4,900,000                  | 4,900,000           | 4,477,614                 | (422,386)                                                             |
| Other                                | 700,000                    | 700,000             | 51,671                    | (648,329)                                                             |
| Interest                             | 30,000                     | 30,000              | 54,508                    | 24,508                                                                |
| Intergovernmental revenue            | -                          | -                   | 3,365,600                 | 3,365,600                                                             |
| Total revenue and other support      | <u>24,830,000</u>          | <u>27,430,000</u>   | <u>30,631,952</u>         | <u>3,201,952</u>                                                      |
| Expenses:                            |                            |                     |                           |                                                                       |
| Salaries                             | 17,173,652                 | 18,973,652          | 18,033,851                | 939,801                                                               |
| Employee benefits and taxes          | 2,918,119                  | 3,431,619           | 3,199,375                 | 232,244                                                               |
| Operating expenses                   | 3,527,700                  | 3,539,200           | 2,945,280                 | 593,920                                                               |
| Leases and rentals                   | 618,247                    | 593,247             | 625,641                   | (32,394)                                                              |
| On-behalf retirement payment expense | -                          | -                   | 3,365,600                 | (3,365,600)                                                           |
| Total expenses                       | <u>24,237,718</u>          | <u>26,537,718</u>   | <u>28,169,747</u>         | <u>(1,632,029)</u>                                                    |
| Excess of revenues over expenses     | <u>\$ 592,282</u>          | <u>\$ 892,282</u>   | <u>\$ 2,462,205</u>       | <u>\$ 1,569,923</u>                                                   |
| Other Budget Items:                  |                            |                     |                           |                                                                       |
| Credits to member districts          | \$ -                       | \$ -                | \$ 1,695,822              | \$ (1,695,822)                                                        |
| Capital budget items, net of gain    | 575,000                    | 875,000             | 650,751                   | 224,249                                                               |
| OPEB obligation funding              | -                          | -                   | -                         | -                                                                     |
|                                      | <u>\$ 575,000</u>          | <u>\$ 875,000</u>   | <u>\$ 2,346,573</u>       | <u>\$ (1,471,573)</u>                                                 |

Note: The schedule above is presented on the same basis used by the Collaborative to present its internal budget to actual comparison and account groupings are not necessarily consistent with the Statement of Revenue, Expenditures and Changes in Fund Balances presented on page 12. Also, capital budget items presented above include actual capital outlays and transfers made to or from the Capital Reserve Fund.



**Valley Collaborative**  
**OPEB Plan - Required Supplementary Information**  
**June 30, 2025**

| <b>Year</b>   | <b>Actuarial<br/>Determined<br/>Contribution</b> | <b>Contributions<br/>in relation to<br/>the actuarially<br/>determined<br/>contribution</b> | <b>Contribution<br/>deficiency<br/>(excess)</b> | <b>Covered<br/>employee<br/>payroll</b> | <b>Contributions<br/>as a percentage<br/>of covered<br/>employee<br/>payroll</b> |
|---------------|--------------------------------------------------|---------------------------------------------------------------------------------------------|-------------------------------------------------|-----------------------------------------|----------------------------------------------------------------------------------|
| June 30, 2019 | \$ 880,811                                       | \$ (61,922)                                                                                 | \$ 818,889                                      | \$ 11,092,407                           | 0.56%                                                                            |
| June 30, 2020 | \$ 951,385                                       | \$ (45,883)                                                                                 | \$ 905,502                                      | \$ 11,425,179                           | 0.40%                                                                            |
| June 30, 2021 | \$ 903,135                                       | \$ (51,730)                                                                                 | \$ 851,405                                      | \$ 10,818,546                           | 0.48%                                                                            |
| June 30, 2022 | \$ 996,816                                       | \$ (1,694,497)                                                                              | \$ (697,681)                                    | \$ 11,143,102                           | 15.21%                                                                           |
| June 30, 2023 | \$ 822,753                                       | \$ (128,142)                                                                                | \$ 694,611                                      | \$ 14,197,170                           | 0.90%                                                                            |
| June 30, 2024 | \$ 1,007,032                                     | \$ (91,727)                                                                                 | \$ 915,305                                      | \$ 14,623,085                           | 0.63%                                                                            |
| June 30, 2025 | \$ 893,884                                       | \$ (109,715)                                                                                | \$ 784,169                                      | \$ 17,432,244                           | 0.63%                                                                            |

**Schedule Presentation**

This schedule is intended to present information for 10 years. Until a 10-year trend is compiled, information is presented for those years for which information is available.

**Valley Collaborative**  
OPEB Plan - Required Supplementary Information  
As of the June 30, 2025 Measurement Date

| Schedule of Changes in the Collaborative's Net OPEB Liability and Related Ratios    |                               |                               |                               |                               |                               |                               |                               |                               |  |
|-------------------------------------------------------------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|--|
| Valuation Date:<br>For the Measurement Period ending on the Measurement Date<br>of: | July 1, 2024<br>June 30, 2025 | July 1, 2023<br>June 30, 2024 | July 1, 2022<br>June 30, 2023 | July 1, 2021<br>June 30, 2022 | July 1, 2020<br>June 30, 2021 | July 1, 2019<br>June 30, 2020 | July 1, 2018<br>June 30, 2019 | July 1, 2017<br>June 30, 2018 |  |
| For the Reporting Period & Fiscal Year ending on:                                   | June 30, 202                  | June 30, 2024                 | June 30, 2023                 | June 30, 2022                 | June 30, 2021                 | June 30, 2020                 | June 30, 2019                 | June 30, 2018                 |  |
| Total OPEB Liability                                                                | 10,333,433                    | 8,654,814                     | 8,406,758                     | 7,855,437                     | 7,760,675                     | 7,321,481                     | 6,291,640                     | 4,270,784                     |  |
| I. Service Cost                                                                     | 802,329                       | 948,235                       | 747,196                       | 917,149                       | 804,839                       | 776,751                       | 752,044                       | 608,129                       |  |
| II. Interest on Total OPEB Liability, Service Cost, and Benefit Payments            | 512,464                       | 436,623                       | 431,978                       | 367,674                       | 344,281                       | 299,442                       | 374,432                       | 18,642                        |  |
| III. Changes in Benefit terms                                                       | -                             | -                             | -                             | -                             | -                             | -                             | -                             | -                             |  |
| IV. Difference between Expected & Actual Plan Experience                            | 383,219                       | -                             | (1,278,180)                   | -                             | (1,125,612)                   | (469)                         | (1,703,175)                   | -                             |  |
| V. Changes of Assumption                                                            | 90,322                        | (1,045,075)                   | 714,395                       | (1,136,144)                   | 467,416                       | -                             | 2,659,477                     | 43,514                        |  |
| VI. Benefit Payments Excluding Implicit Cost                                        | (85,145)                      | (77,701)                      | (54,947)                      | (53,917)                      | (50,682)                      | (44,753)                      | (48,295)                      | (30,590)                      |  |
| VII. Implicit Cost Amount                                                           | (24,570)                      | (14,026)                      | (9,121)                       | -                             | (1,048)                       | (1,130)                       | (13,627)                      | -                             |  |
| VIII. Total Benefit payments including Implicit Cost [VI.+VII.]                     | (109,715)                     | (91,727)                      | (64,068)                      | (53,917)                      | (51,730)                      | (45,883)                      | (61,922)                      | (30,590)                      |  |
| IX. Net Change in OPEB liability [I.+II.+III.+IV.+V.+VIII.]                         | 1,678,619                     | 248,056                       | 551,321                       | 94,762                        | 439,194                       | 1,029,841                     | 2,020,856                     | 639,695                       |  |
| X. Total OPEB liability - beginning of period                                       | 8,654,814                     | 8,406,758                     | 7,855,437                     | 7,760,675                     | 7,321,481                     | 6,291,640                     | 4,270,784                     | (148,019)                     |  |
| XI. Prior Period Adjustment for Retirees not Previously Reflected                   | -                             | -                             | -                             | -                             | -                             | -                             | -                             | -                             |  |
| XII. Total OPEB Liability - end of period [IX.+X.+XI.]                              | 10,333,433                    | 8,654,814                     | 8,406,758                     | 7,855,437                     | 7,760,675                     | 7,321,481                     | 6,291,640                     | 491,676                       |  |
| Plan Fiduciary Net Position                                                         | 8,282,784                     | 7,374,283                     | 6,598,707                     | 6,030,973                     | 5,271,479                     | 4,266,767                     | 4,039,225                     | 3,779,108                     |  |
| XIII. Earning from Plan Investments                                                 | 908,501                       | 775,576                       | 503,660                       | (881,086)                     | 1,004,712                     | 227,542                       | 260,117                       | 236,892                       |  |
| XIV. Employer Contribution to trust                                                 | 109,715                       | 91,727                        | 128,142                       | 1,694,497                     | 51,730                        | 45,883                        | 61,922                        | 30,590                        |  |
| XV. Benefit payments from trust, including refunds of member contributions          | (109,715)                     | (91,727)                      | (64,068)                      | (53,917)                      | (51,730)                      | (45,883)                      | (61,922)                      | (30,590)                      |  |
| XVI. Administrative expense                                                         | -                             | -                             | -                             | -                             | -                             | -                             | -                             | -                             |  |
| XVII. Other                                                                         | -                             | -                             | -                             | -                             | -                             | -                             | -                             | -                             |  |
| XVIII. Net change in plan fiduciary net position [XIII.+XIV.+XV.+XVI.+XVII.]        | 908,501                       | 775,576                       | 567,734                       | 759,494                       | 1,004,712                     | 227,542                       | 260,117                       | 236,892                       |  |
| XIX. Plan fiduciary net position - beginning of period                              | 7,374,283                     | 6,598,707                     | 6,030,973                     | 5,271,479                     | 4,266,767                     | 4,039,225                     | 3,779,108                     | 3,542,216                     |  |
| XX. Plan fiduciary net position - end of period [XVIII.+XIX.]                       | 8,282,784                     | 7,374,283                     | 6,598,707                     | 6,030,973                     | 5,271,479                     | 4,266,767                     | 4,039,225                     | 3,779,108                     |  |
| XXI. Net OPEB Liability [XII.-XX.]                                                  | 2,050,649                     | 1,280,531                     | 1,808,051                     | 1,824,464                     | 2,489,196                     | 3,054,714                     | 2,252,415                     | 491,676                       |  |
| XXII. Plan fiduciary net position as a % of total OPEB liability [XX./XII.]         | 80.16%                        | 85.20%                        | 78.49%                        | 76.77%                        | 67.93%                        | 58.28%                        | 64.20%                        | 768.62%                       |  |
| XXIII. Covered employee payroll                                                     | 17,432,244                    | 14,623,085                    | 14,197,170                    | 11,143,102                    | 10,818,546                    | 11,425,179                    | 11,092,407                    | 11,775,259                    |  |
| XXIV. Plan NOL as % of covered employee payroll [XXI./XXIII]                        | 11.76%                        | 8.76%                         | 12.74%                        | 16.37%                        | 23.01%                        | 26.74%                        | 20.31%                        | 4.18%                         |  |
| Single Discount Rate to calculate Plan Liabilities                                  | 5.22%                         | 5.45%                         | 4.69%                         | 5.04%                         | 4.25%                         | 4.25%                         | 4.25%                         | 7.50%                         |  |

Schedule Presentation

This schedule is intended to present information for 10 years. Until a 10-year trend is compiled, information is presented for those years for which information is available.

See independent auditor's report.

**Valley Collaborative**  
OPEB Plan - Required Supplementary Information  
As of the June 30, 2025 Measurement Date

Notes to Required Supplementary Information:

Valuation Date: Actuarially Determined Contribution was calculated as of July 1, 2024.

Actuarial Cost Method: Individual Entry Age Normal

Asset-Valuation Method: Market Value of Assets as of the Measurement Date, June 30, 2025.

Actuarial Assumptions:

Investment Rate of Return: 5.86%, net of OPEB plan investment expense, including inflation.

Municipal Bond Rate: 4.81% as of June 30, 2025 (source: S&P Municipal Bond 20-Year High Grade Index - SAPIHG)

Single Equivalent Discount Rate: 5.22%, net of OPEB plan investment expense, including inflation.

Inflation: 2.50% as of June 30, 2025 and for future periods

Salary Increases: 3.00% annually as of June 30, 2025 and for future periods

Cost of Living Adjustment: Not Applicable

Pre-Retirement Mortality: General: RP-2014 Mortality Table for Blue Collar Employees projected generationally with scale MP-2021, set forward 1 year for females  
Teachers: PubT-2010 Mortality Table (Headcount-weighted) for Employees projected generationally with scale MP-2021

Post-Retirement Mortality: General: RP-2014 Mortality Table for Blue Collar Healthy Annuitants projected generationally with scale MP-2021, set forward 1 year for females  
Teachers: PubT-2010 Mortality Table (Headcount-weighted) for Healthy Annuitants projected generationally with scale MP-2021

Disabled Mortality: General: RP-2014 Mortality Table for Blue Collar Healthy Annuitants projected generationally with scale MP-2021, set forward 1 year for males and 2 years for females  
Teachers: PubT-2010 Mortality Table (Headcount-weighted) for Healthy Annuitants projected generationally with scale MP-2021

**Valley Collaborative**  
OPEB Plan - Required Supplementary Information  
As of the June 30, 2025 Measurement Date

Notes to Required Supplementary Information (Continued):

Plan Membership

Plan Membership: At July 1, 2024, the OPEB plan membership consisted for the following

|                                                                   |            |
|-------------------------------------------------------------------|------------|
| Inactive employees or beneficiaries currently receiving benefits: | 15         |
| Active Employees:                                                 | <u>267</u> |
| Total:                                                            | 282        |

Events Subsequent to the Measurement Date

To the best of our knowledge there were no material events subsequent to the Measurement Date that would impact the figures shown in this report.

Changes in Assumptions:

From June 30, 2024 to June 30, 2025:

Due to the GASB 75 standards the discount rate has been changed from 5.45% to 5.22%.

Based on recommendations by PERAC, the mortality table has been updated to the RP-2014 Mortality Table projected generationally with scale MP-2021 for non-teachers and PubT-2010 Mortality Table projected generationally with scale MP-2021 for teachers.

Contributions/Withdrawals:

The contribution requirements of plan members and the Collaborative are established and may be amended through Collaborative ordinances. The Collaborative contributed \$0 for the period ending on the June 30, 2025 Measurement Date. For the year ending on the June 30, 2025 Measurement Date total Collaborative premiums plus implicit costs for the retiree medical program were \$109,715. \$24,570 of the \$109,715 represents implicit cost.

Census Data Manipulation:

In the absence of data, the following was assumed:

|                         |                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Spouse Sex:             | Male participants had female spouses and vice versa.                                                                                                                                                                                                                                                                                                                             |
| Spouse Age:             | Male spouses were three years older than female spouses and same sex spouses were the same age.                                                                                                                                                                                                                                                                                  |
| Hire Age:               | Participants who were not on the previous valuation were hired halfway between last valuation and the current valuation. If we did not have census data related to the last valuation, the participants were assumed to have been hired at age forty.                                                                                                                            |
| Retiree Age:            | Retirees had the same birth date as they had the prior valuation. If we did not have census data related to the last valuation, retirees who were enrolled in Active plans were assumed to be age sixty-two and retirees who were enrolled in Medicare Supplement plans were assumed to be age seventy-two. Those not enrolled in a medical plan were assumed to be sixty-seven. |
| School Demographics:    | Two thirds of school participants were teachers.                                                                                                                                                                                                                                                                                                                                 |
| Other Material Changes: | No other data changes were deemed to be material.                                                                                                                                                                                                                                                                                                                                |

**Valley Collaborative**  
**Schedule of the Collaborative's Proportionate Share of Net Pension Liability**  
**For the Year Ended June 30, 2025**

|                                                                                                              |        | <u><b>MTRS</b></u> | <u><b>MSERS</b></u> |
|--------------------------------------------------------------------------------------------------------------|--------|--------------------|---------------------|
| Collaborative's proportion of net pension liability                                                          | FY2015 | 0.07985%           | 0.02466%            |
|                                                                                                              | FY2016 | 0.08405%           | 0.07637%            |
|                                                                                                              | FY2017 | 0.08453%           | 0.08118%            |
|                                                                                                              | FY2018 | 0.09167%           | 0.08646%            |
|                                                                                                              | FY2019 | 0.08325%           | 0.10137%            |
|                                                                                                              | FY2020 | 0.08129%           | 0.08658%            |
|                                                                                                              | FY2021 | 0.07984%           | 0.07671%            |
|                                                                                                              | FY2022 | 0.08333%           | 0.09316%            |
|                                                                                                              | FY2023 | 0.08290%           | 0.09784%            |
|                                                                                                              | FY2024 | 0.08321%           | 0.11139%            |
| Collaborative's proportionate share of net pension liability                                                 | FY2015 | \$ 16,360,313      | \$ 2,806,546        |
|                                                                                                              | FY2016 | \$ 18,790,793      | \$ 10,530,873       |
|                                                                                                              | FY2017 | \$ 19,344,064      | \$ 10,410,850       |
|                                                                                                              | FY2018 | \$ 21,737,193      | \$ 11,438,238       |
|                                                                                                              | FY2019 | \$ 20,989,574      | \$ 14,834,931       |
|                                                                                                              | FY2020 | \$ 23,205,036      | \$ 14,855,001       |
|                                                                                                              | FY2021 | \$ 18,129,788      | \$ 8,006,281        |
|                                                                                                              | FY2022 | \$ 21,572,960      | \$ 12,958,656       |
|                                                                                                              | FY2023 | \$ 21,794,595      | \$ 14,331,557       |
|                                                                                                              | FY2024 | \$ 21,098,472      | \$ 15,733,379       |
| Collaborative's covered-employee payroll                                                                     | FY2015 | \$ 5,347,143       | \$ 4,285,929        |
|                                                                                                              | FY2016 | \$ 5,527,894       | \$ 4,254,279        |
|                                                                                                              | FY2017 | \$ 5,762,613       | \$ 4,635,195        |
|                                                                                                              | FY2018 | \$ 6,333,668       | \$ 6,028,713        |
|                                                                                                              | FY2019 | \$ 6,087,231       | \$ 6,039,995        |
|                                                                                                              | FY2020 | \$ 6,181,687       | \$ 5,305,358        |
|                                                                                                              | FY2021 | \$ 6,202,814       | \$ 4,668,914        |
|                                                                                                              | FY2022 | \$ 6,274,492       | \$ 5,856,826        |
|                                                                                                              | FY2023 | \$ 7,162,705       | \$ 6,145,191        |
|                                                                                                              | FY2024 | \$ 7,488,098       | \$ 7,832,325        |
| Collaborative's proportionate share of net pension liability as a percentage of its covered-employee payroll | FY2015 | 305.96%            | 65.48%              |
|                                                                                                              | FY2016 | 339.93%            | 247.54%             |
|                                                                                                              | FY2017 | 335.68%            | 224.60%             |
|                                                                                                              | FY2018 | 343.20%            | 189.73%             |
|                                                                                                              | FY2019 | 344.81%            | 245.61%             |
|                                                                                                              | FY2020 | 375.38%            | 280.00%             |
|                                                                                                              | FY2021 | 292.28%            | 171.48%             |
|                                                                                                              | FY2022 | 343.82%            | 221.26%             |
|                                                                                                              | FY2023 | 304.28%            | 233.22%             |
|                                                                                                              | FY2024 | 281.76%            | 200.88%             |
| Plan fiduciary net position as a percentage of total pension liability                                       | FY2015 | 55.38%             | 67.87%              |
|                                                                                                              | FY2016 | 52.73%             | 63.48%              |
|                                                                                                              | FY2017 | 54.25%             | 67.21%              |
|                                                                                                              | FY2018 | 54.84%             | 67.91%              |
|                                                                                                              | FY2019 | 53.95%             | 66.28%              |
|                                                                                                              | FY2020 | 50.67%             | 62.48%              |
|                                                                                                              | FY2021 | 62.03%             | 77.54%              |
|                                                                                                              | FY2022 | 57.75%             | 71.05%              |
|                                                                                                              | FY2023 | 58.48%             | 70.71%              |
|                                                                                                              | FY2024 | 61.45%             | 72.90%              |

Notes to Required Supplementary Information

MTRS is the Massachusetts Teachers' Retirement System. MSERS is the Massachusetts State Employees' Retirement System. Also, see Note E to financial statements.

Measurement Date

The amounts presented in this schedule were determined as of June 30, 2024.

Schedule Presentation

This schedule is intended to present information for 10 years. Until a 10-year trend is compiled, information is presented for those years for which information is available.

See independent auditor's report.

**Valley Collaborative**  
Schedule of Pension Contributions  
For the Year Ended June 30, 2025

**MTRS**

|                                                           | FY2015       | FY2016       | FY2017       | FY2018       | FY2019       | FY2020       | FY2021       | FY2022       | FY2023       | FY2024       |
|-----------------------------------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Contractually required contribution                       | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         |
| Contributions in relation to the                          |              |              |              |              |              |              |              |              |              |              |
| contractually required contribution                       | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         |
| Contribution deficiency (excess)                          | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         |
| Collaborative's covered-employee payroll                  | \$ 5,347,143 | \$ 5,527,894 | \$ 5,762,613 | \$ 6,333,668 | \$ 6,087,231 | \$ 6,181,687 | \$ 6,202,814 | \$ 6,274,492 | \$ 7,162,705 | \$ 7,488,098 |
| Contributions as a percentage of covered-employee payroll | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        | 0.00%        |

**MSERS**

|                                                           |              |              |              |              |              |              |              |              |              |              |
|-----------------------------------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Contractually required contribution                       | \$ 240,012   | \$ 238,217   | \$ 259,571   | \$ 337,608   | \$ 338,240   | \$ 323,627   | \$ 284,804   | \$ 357,266   | \$ 374,857   | \$ 477,772   |
| Contributions in relation to the                          |              |              |              |              |              |              |              |              |              |              |
| contractually required contribution                       | \$ 240,012   | \$ 238,217   | \$ 259,571   | \$ 337,608   | \$ 338,240   | \$ 323,627   | \$ 284,804   | \$ 357,266   | \$ 374,857   | \$ 477,772   |
| Contribution deficiency (excess)                          | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         | \$ -         |
| Collaborative's covered-employee payroll                  | \$ 4,285,929 | \$ 4,254,279 | \$ 4,635,195 | \$ 6,028,713 | \$ 6,039,995 | \$ 5,305,358 | \$ 4,668,914 | \$ 5,856,826 | \$ 6,145,191 | \$ 7,832,325 |
| Contributions as a percentage of covered-employee payroll | 5.60%        | 5.60%        | 5.60%        | 5.60%        | 5.60%        | 6.10%        | 6.10%        | 6.10%        | 6.10%        | 6.10%        |

**Notes to Required Supplementary Information**

MTRS is the Massachusetts Teachers' Retirement System. MSERS is the Massachusetts State Employees' Retirement System. Also, see Note E to financial statements.

**Measurement Date**

The amounts presented in this schedule were determined as of June 30, 2024.

**Schedule Presentation**

This schedule is intended to present information for 10 years. Until a 10-year trend is compiled, information is presented for those years for which information is available.

**Contributions**

The Collaborative is required to pay an annual appropriation as established by the Public Employees' Retirement Administration Commission (PERAC) for MSERS. No contribution is required for MTRS. The Commonwealth of Massachusetts as a nonemployer is legally responsible for the entire past service cost related to the Collaborative and therefore has a 100% special funding situation.



**FRITZ DEGUGLIELMO LLC**  
**CERTIFIED PUBLIC ACCOUNTANTS**  
**& BUSINESS ADVISORS**

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND  
ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS  
PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS***

To the Board of Directors of  
Valley Collaborative  
North Billerica, Massachusetts

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of Valley Collaborative (a collaborative organized under the Laws of the Commonwealth of Massachusetts), as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise Valley Collaborative's basic financial statements, and have issued our report thereon dated November 20, 2025.

**Report on Internal Control over Financial Reporting**

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

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

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

**Report on Compliance and Other Matters**

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

### **Purpose of this Report**

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

A handwritten signature in black ink, appearing to read "Fitch Dwyer LLC", is written in a cursive style.

Certified Public Accountants

Newburyport, Massachusetts

November 20, 2025





# Central Administration

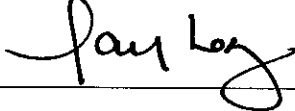
11 Executive Park Dr, Billerica MA 01862 | Tel: (978)528-7800 | [www.valleycollaborative.org](http://www.valleycollaborative.org)

## DETERMINATION OF CUMULATIVE SURPLUS (BOARD VOTE) For the Year Ended June 30, 2025

We, the Board of Directors of Valley Collaborative, have determined the fiscal year cumulative general fund surplus to be \$7,614,806 and have voted to accept said surplus as presented in the Cumulative Surplus worksheet in Note L to the financial statements.

We also certify that the representations made by management and the disclosures in the financial statements are accurate and have been correctly and completely disclosed as required by accounting principles generally accepted in the United States of America and under Commonwealth of Massachusetts laws for the year ended June 30, 2025.

Board Chair

  
\_\_\_\_\_

Date of Board Vote

11-20-2025



# Central Administration

11 Executive Park Dr, Billerica MA 01862 | Tel: (978)528-7800 | [www.valleycollaborative.org](http://www.valleycollaborative.org)

## ACCEPTANCE OF THE BOARD OF DIRECTORS

We, the Board of Directors of the Valley Collaborative, have voted to accept the representations of management and the expression of the opinions made by Fritz DeGuglielmo LLC as embodied in the financial statements, supplemental schedules and independent auditor's reports for the year ended June 30, 2025.

We also certify that the representations made by management and the disclosures in the financial statements are accurate and have been correctly and completely disclosed as required by accounting principles generally accepted in the United States of America and under Commonwealth of Massachusetts laws for the year ended June 30, 2025.

  
Board Chair

11-20-2025  
Date