



**School Committee
Meeting Book**

**January 6, 2016
7:00 pm**

**Town Hall
Selectmen's Meeting Room**



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting
AGENDA
January 6, 2016 7:00pm
Town Hall—Selectmen's Meeting Room



Items

Suggested time allotments

I.	Public Participation	7:00 – 7:10
II.	Chairperson's Report & Members' Reports	
III.	Superintendent's Report	
IV.	Time Scheduled Appointments: A. State of the District: Report	7:10 – 7:40
V.	Curriculum	
VI.	Policy	
VII.	Finance & Operations A. Charter Schools & School Choice: Annual Report	7:40 – 8:05
VIII.	Old Business	
IX.	New Business A. Assabet Valley Collaborative: Quarterly Update	8:05 – 8:15
X.	Approval of Minutes	8:15 – 8:20
XI.	Executive Session A. Negotiations: Shrewsbury Education Association, Unit A	8:20 – 9:00
XII.	Adjournment	9:00

Next regular meeting: January 20, 2016



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting



ITEM NO: I. Public Participation

MEETING DATE: 1/6/16

SPECIFIC STATEMENT OR QUESTION:

Will the School Committee hear thoughts and ideas from the public regarding the operations and the programs of the school system?

BACKGROUND INFORMATION:

Copies of the policy and procedure for Public Participation are available to the public at each School Committee meeting.

ITEM NO: II. Chairperson's Report/Members' Reports

SPECIFIC STATEMENT OR QUESTION:

Will the School Committee hear a report from Mr. John Samia, Chairperson of the School Committee and other members of the School Committee who may wish to comment on school affairs?

BACKGROUND INFORMATION:

This agenda item provides an opportunity for the Chairperson and members of the Shrewsbury School Committee to comment on school affairs that are of interest to the community.

STAFF AVAILABLE FOR PRESENTATION:

Mr. John Samia, Chairperson
Ms. Sandra Fryc, Vice Chairperson
Ms. Erin Canzano, Secretary
Dr. B. Dale Magee, Committee Member
Mr. Jon Wensky, Committee Member

ITEM NO: III. Superintendent's Report

SPECIFIC STATEMENT OR QUESTION:

Will the School Committee hear a report from Dr. Joseph M. Sawyer, Superintendent of Schools?

BACKGROUND INFORMATION:

This agenda item allows the Superintendent of the Shrewsbury Public Schools to comment informally on the programs and activities of the school system.

STAFF AVAILABLE FOR PRESENTATION:

Dr. Joseph M. Sawyer, Superintendent of Schools

ACTION RECOMMENDED FOR ITEMS I, II, & III:

That the School Committee accept the report and take such action as it deems in the best interest of the school system.



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting



ITEM NO: IV. Time Scheduled Appointment
A. State of the District

MEETING DATE: 1/6/16

SPECIFIC STATEMENT OR QUESTION:

Will the School Committee hear a presentation on state of the district?

BACKGROUND INFORMATION:

1. Dr. Sawyer will share his perspective regarding the current state of the Shrewsbury Public Schools relative to the district's mission, core values, and strategic priorities.
2. A slide presentation will accompany Dr. Sawyer's remarks at the meeting.

ACTION RECOMMENDED:

That the School Committee hear the report and take whatever steps it deems necessary in the interests of the Shrewsbury Public Schools.

STAFF AVAILABLE FOR PRESENTATION:

Dr. Joseph M. Sawyer, Superintendent of Schools



Shrewsbury Public Schools

Joseph M. Sawyer, Ed.D.
Superintendent

December 31, 2015

To: School Committee
From: Joe Sawyer
Re: State of the District

On this last day of 2015, I am sharing my reflections regarding the current state of our school district. I will also share my thinking in person at your January 6 meeting, at which time I will be pleased to hear any feedback and answer any questions you may have.

My assessment of the current state of the Shrewsbury Public Schools is summarized in the following four points:

1. Our students are thriving in schools that provide excellent educational experiences within respectful and purposeful cultures.
2. Our educators are succeeding in advancing our strategic priorities through collaboration and innovation.
3. Our school facilities are strong overall; however, there is inadequate space in the early grades and some buildings are in need of significant investments in infrastructure.
4. Our district, like all public school districts, is subject to demands for performance, mandates for compliance, and pressures for addressing societal issues -- but must operate within a fiscal environment where many costs are unavoidable, yet financial resources are both structurally limited and unrelated to performance.

I will provide a brief, big picture overview of each point below to illustrate my assessment, and I will provide examples when I present the report on January 6th.

Our students are thriving...

The data clearly show that Shrewsbury students are excelling on virtually every common measure of academic performance, from [state tests](#), to [national tests](#), to [post-graduation options](#). However, it is also important to illustrate students' experiences, which not only create those academic results, but that also support students' overall growth and development. Any visitor to our schools will encounter the following:

- An atmosphere of respect, where students and staff interact positively
- Classrooms where expert instruction is occurring and where students are engaged in learning both content and skills; in the middle and high school grades, this includes the innovative use of individual digital technology
- Examples of students engaged in a wide variety of academic pursuits, including the so-called "core subjects," as well as foreign language, music, drama, visual arts, physical education, health, food science, child development, computer programming, engineering, etc.
- Specialized programs for students who need additional or different kinds of support, including special education, English language learning, counseling services, nursing care, reading tutoring, etc.
- Students excelling in various co-curricular activities, including speech and debate, academic competitions, robotics, athletics, musicals and plays, special interest clubs, etc.

- Evidence of student leadership and of various projects through which students are giving thousands of volunteer hours to serve their community

Our educators are succeeding...

Exceptional educators and support staff are the most important factor in school quality, and Shrewsbury has a longstanding, well-deserved reputation for having high quality people performing the difficult work of educating students to high standards. Our administrators, teachers, paraprofessionals, secretaries, and technicians routinely go above and beyond to provide our students with what they need to succeed.

I am struck by the level of professional collaboration I see in the field, where educators are working together to examine assessment data, set ambitious learning goals for students, plan and share instructional practices, and support one another in improving their craft. Teamwork is the norm among educators in Shrewsbury, and this approach is paying off for students by ensuring the spread and implementation of best practices through true collegiality.

I am also continuously impressed with the innovation I witness in our educators' practice, especially when utilizing the significant new technologies at their disposal. The opportunities for teachers to get assessment data in real time, personalize learning for individuals and groups, and provide students with multiple access points and pathways to understanding and competence have never been greater. Our educators who have this access are doing remarkable work in leveraging technology to enhance student learning, but they and others are also utilizing approaches that do not use technology but do represent new approaches to teaching and learning, such as the work being done with the new mathematics program and the Shrewsbury Writing Project. Innovative practices do set our district apart from the norm, and translate into better learning experiences for Shrewsbury's students.

Our school facilities are strong -- however...

When it comes to the schools which have been built or fully renovated since 1997 (Floral Street School, Shrewsbury High School, Oak Middle School, Parker Road Preschool, and Sherwood Middle School), students in Shrewsbury enjoy some of the finest school facilities in the state. Of the other schools that predate this era, both the Paton School and Spring Street School have received attention in recent years through projects such as new windows and/or roof, updated flooring, etc. and are generally in very good shape in those areas; however, their heating infrastructure will require replacement soon, and these are major projects. Coolidge School has most recently had lighting improvements and is generally in good shape, but will require some significant work before too long given the age and condition of the building.

All three of these schools utilize a number of modular classrooms, added to absorb rapid growth in the late '90's, which will eventually require attention in ways that permanent structures do not. Of course, the Beal Early Childhood Center, built in 1922, represents the most extreme need when it comes to infrastructure, as the building is coming to the end of its useful life. Fortunately, the Massachusetts School Building Authority (MSBA) has informed me by phone that the MSBA staff is recommending that Beal be entered into the "eligibility period" that begins the process of a potential building project -- we will know more specifics after the MSBA Board meeting on January 27.

Regarding our space needs, we are fully utilizing spaces at Sherwood, Oak, and SHS, with some room sharing necessary but with programming needs met. Next year's expected bump in ninth grade enrollment will further stress the high school's capacity, but the facility will handle the growth. It should be noted that the district has not had adequate space for its early childhood and elementary programs for many years, as evidenced by the following:

- the continued need to rent an additional building on Wesleyan Terrace (behind the Maple Ave. Post Office) to provide two classrooms (used for kindergarten in past years and for preschool in recent years)
- the continued use of Beal classrooms as overflow for Floral Street elementary students (currently four classrooms being used for Floral Street first grades); this reduces the availability of classrooms for full day kindergarten, which is highly desirable both educationally and for

parents, and which is the reality in about 90% of public kindergarten classrooms in Massachusetts.

- the increase in the need for specialized spaces for intensive special needs programming, English language learner instruction, and other mandated services; in some cases this has resulted in lack of spaces for art or music instruction, which then must be delivered “on a cart” by visiting the regular classroom.
- the lack of separate gymnasium and cafeteria spaces at Paton School, where one multipurpose space limits the ability to schedule physical education classes and alternative uses of the cafeteria for special programs, etc.

Demands, mandates, pressures, and fiscal constraints

In my opinion, there has never been a more exciting time for education, given the growth of the knowledge base of effective practices, the technological tools available to enhance instruction, and the ubiquitous availability of information. I also believe that there has never been more complexity involved in the endeavor of public education. Our schools are held accountable for educating all students at high levels, and our students have never been more diverse in terms of educational needs. The number of students with very significant medical and developmental disabilities continues to require more -- and more intensive -- programming, which we try to provide within community schools wherever possible.

State mandates for how students with disabilities and with English learning needs are educated create significant programming needs, while other mandates such as those regarding how educators are evaluated require significant resources to address.

State policies regarding charter schools, school choice, and virtual schools create choices for families that divert critical funding when exercised, which makes it important for our district to be able to retain as many students as possible. Societal pressures, such as the increased mental health needs of students and issues such as the opioid epidemic, create greater needs in our schools for services such as counseling or preventive education, as well as real costs such as tuitions at the newly opened Recovery High School for a very small number of students with addiction issues.

At the same time, the state’s education funding formula continues to identify Shrewsbury as a community whose relative financial status results in minimal increases in state aid, while local governmental revenue is constrained. Unlike organizations in other sectors, our district’s high levels of success do not translate into more fiscal resources to apply to cost pressures -- these are decoupled.

The recent operational override provided the resources for our schools to emerge from a crisis situation and address critical needs for class size and curriculum resources, but the economics of state and local government combined with cost pressures, many beyond the district’s control, will make the next budget cycle a challenging one.

Conclusion

There is no doubt that the state of our school district is very strong. It is justified to say that, in many ways, we are providing a world class education to Shrewsbury’s young people. Our students are thriving in a variety of areas; our staff excel at their work through collaboration and innovation; and our facilities are strong, with some obvious needs. However, the complexities and pressures that are endemic to public education, and to the government sector, will continue to provide challenges that our district must address. Continued focus on our mission, core values, and strategic priorities will help us navigate these challenges in the near future and for the long run.



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting



ITEM NO: **V. Curriculum**

MEETING DATE: **1/6/16**

SPECIFIC STATEMENT OR QUESTION:

BACKGROUND INFORMATION:

ACTION RECOMMENDED:

STAFF & STUDENTS AVAILABLE FOR PRESENTATION:



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting



ITEM NO: **VI. Policy**

MEETING DATE: **1/6/16**

SPECIFIC STATEMENT OR QUESTION:

BACKGROUND INFORMATION:

ACTION RECOMMENDED:

STAFF AVAILABLE FOR PRESENTATION:



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting



ITEM NO: **VII. Finance & Operations**

MEETING DATE: **1/6/16**

A. Charter Schools & School Choice: Annual Report

SPECIFIC STATEMENT OR QUESTION:

Will the School Committee hear a report on student enrollment in charter schools and through school choice?

BACKGROUND INFORMATION:

1. Under Massachusetts law, families may choose to send their children to charter schools for which their communities are eligible or to school districts that receive students through inter-district school choice. Additionally, state law now provides the opportunity for students to be educated in virtual schools through online instruction.
2. The enclosed report provides data regarding the number of students opting for charter schools, school choice and virtual schools, and the financial impact on the Town of Shrewsbury.

ACTION RECOMMENDED:

That the School Committee hear the report and take what ever steps it deems necessary in the interests of the Shrewsbury Public Schools.

MEMBERS/STAFF AVAILABLE FOR PRESENTATION:

Dr. Joseph M. Sawyer, Superintendent of Schools

Mr. Patrick C. Collins, Assistant Superintendent for Finance and Operations



Shrewsbury Public Schools

Patrick C. Collins, Assistant Superintendent for Finance & Operations

31 December 2015

To: School Committee

Subj: SCHOOL CHOICE AND CHARTER SCHOOL REPORT

Charter School Enrollment & Tuition Report

Under Massachusetts law, families may choose to attend charter schools, which are publicly funded independent schools which operate under a charter granted by the Department of Elementary and Secondary Education (DESE), and which are governed by a board of trustees that is not publicly elected, but rather appointed by the charter school's own board. Student admission to a charter school is based on the student residing in a community that charter school serves, by lottery if seats are limited, and with students living in communities for which the school was specifically chartered and siblings of existing students receiving preference. By way of example, the Advanced Math and Science Academy charter school in Marlborough (AMSA) was chartered for students residing in Marlborough, Maynard, Hudson, and Clinton, so students from those communities receive preference for admission, but several other communities are included in their attendance area, including Shrewsbury.

The funding formula for charter schools is complex. I have included information from the DESE that explains both how tuition rates are calculated and how the state's reimbursement formula works. A simplified explanation of charter school finance is:

- the state applies the Chapter 70 foundation formula to the actual students from a particular community attending a specific charter school to arrive at a tuition cost per student (the foundation formula has different allocations for a student's grade level, socioeconomic status, special education status, etc.)
- the state then applies another formula to include an allowance for how much the sending community spends beyond the state's minimum requirement in its own public schools (i.e., percentage above required "net school spending")
- the state assesses an allowance to capture school facility costs based on a statewide average, and then provides "facilities aid" in the same amount, so this assessment has no impact on the cost to communities
- the tuition rate derived for that cohort of students attending a particular charter school is multiplied by the number of full time equivalent students in that cohort from that community (e.g., the tuition rate established for students from Shrewsbury attending AMSA multiplied by the number of FTE students attending AMSA)
- if the total tuition charged to a district for all of its charter school attending students in the current

fiscal year is greater than the previous fiscal year, the *amount of the tuition increase* is to be reimbursed by the state, with 100% of that increase reimbursed in the first year, followed by five years in which that increase is reimbursed at a 25% rate (however, the state has not fully funded the reimbursement formula in recent years)

- if a student attends a charter school after having been home schooled or in a private school, the district receives a 100% reimbursement for the first year of that individual student's tuition and no further reimbursements after that
- The table below shows the preliminary rates for the current fiscal year for Shrewsbury students attending charter schools; note how the tuition varies depending on the cohort of students, because each has different characteristics that trigger different rates in the foundation formula

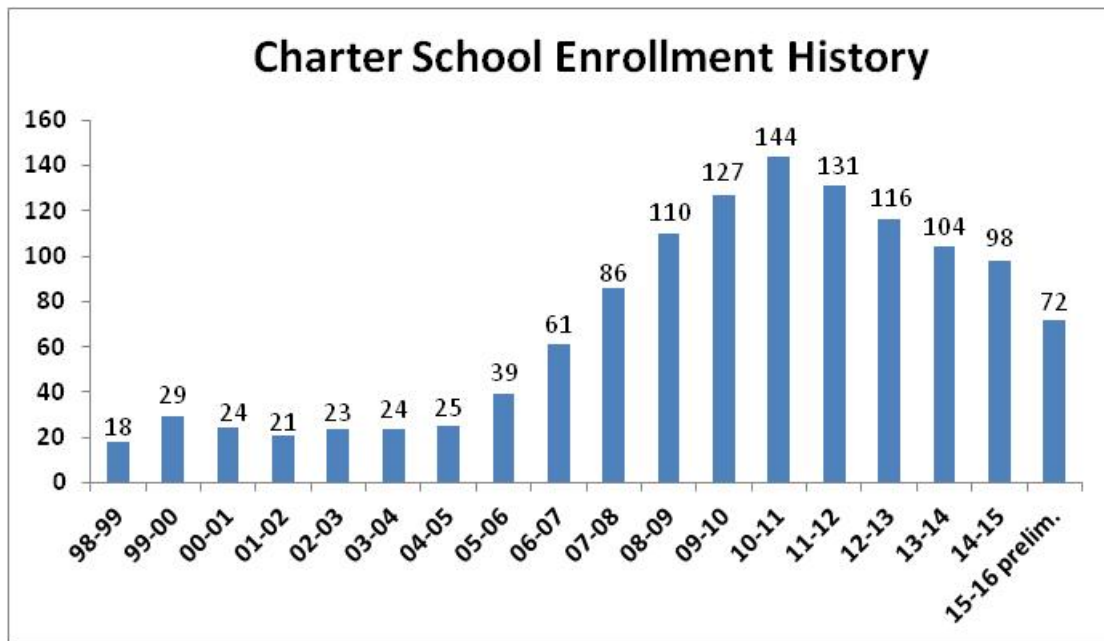
Massachusetts Department of Elementary and Secondary Education

Preliminary FY16 Rates by Charter School and Sending District (Q2)

Cha Lea	Charter School	Campus Lea	Campus Location	Send Lea	Sending District	FTE	Foundation Base Rate	Above Foundation Spending Rate	Facilities Aid Rate	Trans- porta- tion Rate	TOTAL Foundation Formula Rate
430	ADVANCED MATH AND SCIENCE AC	170	MARLBOROUGH	271	SHREWSBURY	63.0	9,831	2,263	893	0	12,987
445	ABBY KELLEY FOSTER	348	WORCESTER	271	SHREWSBURY	8.0	10,324	2,377	893	0	13,594
478	FRANCIS W. PARKER CHARTER ESS	352	DEVENS	271	SHREWSBURY	1.0	9,860	2,270	893	0	13,023

One of the reasons most public school districts object to the way that charter schools are funded is that the formula is not sensitive to economy of scale nor the issue of average cost versus marginal cost to educate. For example, the 72 Shrewsbury students attending charter schools this year are spread across many grades; if all were to return to the school district next year, there would be virtually no effect on the district's budget, as they would be readily absorbed with existing staffing and overhead costs. However, this year these students will cost Shrewsbury over \$920,930 in tuition that is diverted from the town's state aid for education. Another way of illustrating this is that the amount of funds being diverted to charter schools represents roughly 1.6% of the School Department's appropriated budget; yet, because of our fixed costs, it is not possible for the district to reduce 1.6% of personnel costs, overhead costs, facility capital costs, etc. without compromising the program for the 6,000 remaining students, as those resources remain necessary to serve their needs (e.g., we can't cut 1.6% of each teacher the charter students would have had, 1.6% of secretaries, 1.6% of those schools' principals, etc.).

The good news for the district financially is that charter school enrollment continues to trend downward. Charter enrollment hit a peak of 144.1 FTE in FY11, compared to the current enrollment of 72, a reduction of 50% from peak.



While charter school enrollment is trending significantly downward, the net cost to the town/district has not followed at the same pace. This is because the state reimbursement scheme for these students also results in a decrease in reimbursement. So, as one can see below the net enrollment change from FY14 to FY15 was a decrease of 6.17 while net cost to the district increased by \$41,870.

Massachusetts Department of Elementary and Secondary Education

SCHOOL FINANCE

Summary of Historical Sending District Charter School FTE, Tuition, and Reimbursements

271 SHREWSBURY		FY09	FY10	FY11	FY12	FY13	FY14	FY15
FTE		110.15	127.16	144.14	130.79	116.28	104.36	98.19
Tuition		1,025,068	1,151,129	1,321,539	1,279,450	1,226,276	1,142,099	1,221,904
Facilities Aid		95,665	106,489	118,052	113,196	100,058	90,037	85,270
Chapter 46 Aid		446,696	351,695	330,718	85,807	38,006	38,663	81,365
Total Aid		542,361	458,184	448,770	199,003	138,064	128,700	166,635
Net Cost to District		482,707	692,945	872,769	1,080,447	1,088,212	1,013,399	1,055,269

The FY16 preliminary data shows a drop in net cost of \$197,312 as a result of the continued decreasing enrollment as shown in this table:

Massachusetts Department of Elementary and Secondary Education

OFFICE OF SCHOOL FINANCE

Preliminary FY16 Charter School Tuition Payments and Reimbursements for Sending Districts (Q2)

DISTRICT PAYMENT					STATE AID TO DISTRICT				NET DISTRICT COST
DISTRICT	FTE	LOCAL FOUNDATION TUITION	LOCAL FACILITIES TUITION	LOCAL PAYMENT	100/25/25/25/25 INCREASED TUITION AID	INCREASED AID PRO RATION	FACILITIES AID	TOTAL CHARTER AID	
SHREWSBURY	72.0	857,957	62,973	920,930	0	0%	62,973	62,973	857,957

It is also critical to note that in FY16 the Commonwealth is not fully funding its own reimbursement formula. If state reimbursement were fully funded the town would have received an additional \$60,855 thereby reducing our net cost by the same amount.

At the time of this writing the actual student enrollment roster for the 72 charter school students was not available from the Department of Elementary and Secondary Education [DESE]. It is interesting to note that the initial enrollment projection provided by DESE in spring 2015 for the 2015-2016 school year indicated a total enrollment of 81 students. Actual enrollment is 72. We await the file from DESE to analyze the ongoing shift away from charter schools.

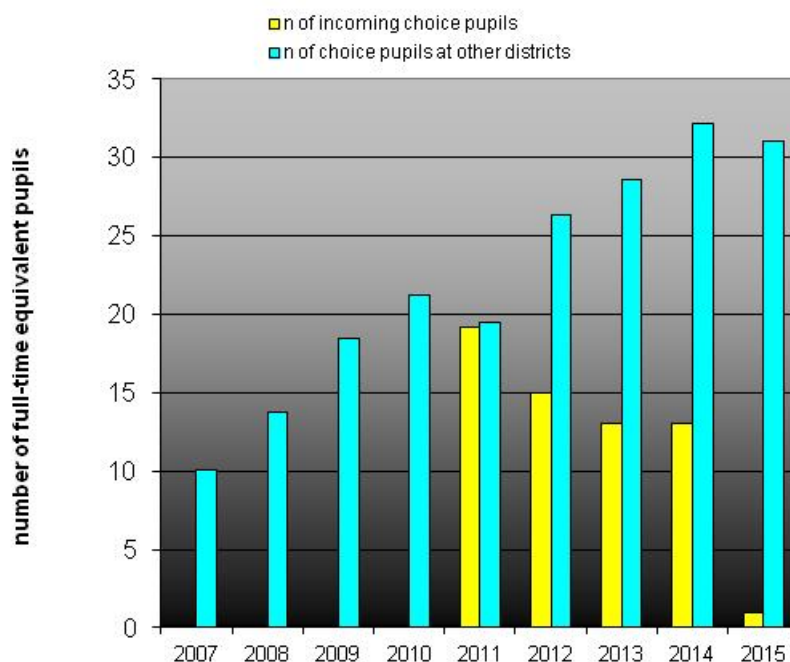
We do know the trend of fewer students attending charter schools can be attributed to various factors. Anecdotal evidence indicates that reasons that appear to be influencing families' choices to have their students remain in our district include the opening of the new Sherwood Middle School; the advanced math programming added at Sherwood and Oak Middle Schools in recent years; the innovative approach to the use of technology; and certainly the reduction of class sizes and restoration of resources thanks to the recent operational override.

I look forward to discussing this information and answering your questions at your meeting on January 6th.

Inter-District School Choice Enrollment and Tuition Report

From the inception of the School Choice Program in FY92, statewide school choice enrollments have ballooned from 920 students to over 15,000 in FY16. Presently, 186 school districts have opted into the program and they receive schoolchildren from 310 different school districts. This update provides information on both sending and receiving school choice students to and from Shrewsbury.

With the exception of FY11, Shrewsbury Public Schools has opted out of the School Choice Program primarily due to space limitations. The chart below from DESE displays the recent history of sending and receiving students. The 19 students accepted in FY11 were restricted to grade 9. Once a School Choice pupil is accepted into a district they are entitled to stay through graduation and do not have to re-apply each year.



The preliminary roster from DESE for FY16 details 30 Shrewsbury school-age children attending school in other school districts. We no longer are “receiving” students as the last student who was accepted in FY11 graduated. The town receives a \$5,000 charge per pupil for each sending student. Additional charges apply for students requiring special education services. Students who opt for school in another district must provide their own transportation.

A more recent dimension of the School Choice Program is the addition of students enrolling in and “attending” virtual schools approved by the Commonwealth. Currently, of the 30 School Choice sending students, seven are enrolled in virtual schools. One student is enrolled at the Massachusetts Virtual Academy [Greenfield, MA] and the remaining six are enrolled at The Education Cooperative Connections Academy [TECCA], located in East Walpole, MA. Tuition for these students is \$6,700 per year.

The chart below displays a short history of the financial impact of being both a sending and receiving school district. As a reminder when the School Committee opts into the School Choice Program, tuition receipts are placed into a separate School Choice Revolving Fund and available for direct use by the School Committee, without further appropriation. The tuition charges for sending students are subtracted from the state aid payments made to the town on a monthly basis.

271 SHREWSBURY			
FY	---Receiving---		---Sending---
	FTE Pupils	Tuition	FTE Pupils Tuition
2007	0.00	0	10.04 61,861
2008	0.00	0	13.72 78,480
2009	0.00	0	18.48 106,835
2010	0.00	0	21.20 113,286
2011	19.21	96,050	19.48 107,984
2012	15.00	79,568	26.32 149,193
2013	13.00	69,167	28.61 144,191
2014	13.00	68,725	32.14 185,881
2015	1.00	4,989	31.00 220,220
2016	0.00	0	30.00 184,243

The chart below shows the grade distribution of our current “sending” students and further depicts it using our current grade/school configuration. It’s clear that the largest concentration of students opting out of Shrewsbury Public Schools occurs at the high school level. It also seems apparent that some parents who cannot access full-day kindergarten in Shrewsbury are opting for it in another district.

FDK	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9	Grade 10	Grade 11	Grade 12	Total
3	2	2	1	3	0	3	1	2	2	4	4	3	30
FDK	Grade 1-4				Grade 5-6		Grade 7-8		Grade 9-12				Total
3	8				3		3		13				30

Finally, it’s interesting to see that the 30 students are enrolled in 13 different school districts as listed with their grade level on the following page. These 30 students belong to 25 families so we have several siblings attending other school districts together. This might be a result of a parent’s employment in that district or nearby.

Receiving District	Grade
AUBURN	09
FITCHBURG	11
GRAFTON	10
GRAFTON	08
HUDSON	06
MILFORD	01
NORTHBRIDGE	KF
UXBRIDGE	11
UXBRIDGE	12
WEST BOYLSTON	04
WORCESTER	02
WORCESTER	03
WORCESTER	KF
WORCESTER	KF
WORCESTER	01
WORCESTER	02
WORCESTER	04
WORCESTER	04
BERLIN BOYLSTON	10
BERLIN BOYLSTON	07
BERLIN BOYLSTON	10
BERLIN BOYLSTON	08
RALPH C MAHAR	12
MAVA	06
TECCA	09
TECCA	11
TECCA	11
TECCA	06
TECCA	12
TECCA	10

In closing, the School Choice Program enrollment has remained fairly stable ranging from 26-32 sending students in the last five years. With the upcoming FY17 budget discussions the School Committee may wish to consider again opting into the School Choice Program on a limited basis to generate some revenue to sustain our programs.



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting



ITEM NO: **VIII. Old Business**

MEETING DATE: **1/6/16**

SPECIFIC STATEMENT OR QUESTION:

BACKGROUND INFORMATION:

ACTION RECOMMENDED:

MEMBERS/STAFF AVAILABLE FOR PRESENTATION:



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting



ITEM NO: IX. New Business

A. Assabet Valley Collaborative: Quarterly Update

SPECIFIC STATEMENT OR QUESTION:

Will the School Committee hear a quarterly update on the status of the Assabet Valley Collaborative?

BACKGROUND INFORMATION:

1. The state law governing educational collaboratives requires quarterly updates to member school districts.
2. Each year member school committees must be provided with copies of the collaborative's annual report and audited financial statement. Both of these documents are enclosed.

ACTION RECOMMENDED:

That the School Committee hear a quarterly update on the status of the Assabet Valley Collaborative and take whatever steps it deems necessary in the interests of the Shrewsbury Public Schools.

STAFF AVAILABLE FOR PRESENTATION:

Dr. Joseph M. Sawyer, Superintendent of Schools

AVC
Assabet Valley
COLLABORATIVE



2015
ANNUAL REPORT

STUDENT-CENTERED
foster independence
increased potential  **EMPOWER**
connecting families
collaborate **FOR** PARTNERSHIP
 **success** **ALL**  **SUPPORT**
Opportunity **LEARNERS** **IMPACT**
student engagement *academic*
STRENGTHS-BASED *rigor*

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Educating and
Empowering
all Learners through
Partnership and
Collaboration



Providing joint programs and services for school districts of:

Assabet Valley Regional
Technical High School
Berlin/Boylston Region
Berlin
Boylston
Grafton
Hudson
Marlborough
Maynard
Millbury
Nashoba Region
Northborough
Northborough/
Southborough Region
Southborough
Shrewsbury
Westborough

Offering the following programs:

AVCAS
Consultation Services
Evolution
Family Success Partnership
Professional Development
REACH
SOAR
Transportation Services

MESSAGE FROM THE EXECUTIVE DIRECTOR

Dear Assabet Valley Collaborative Community Members,

I am pleased to present our 2014-2015 Annual Report. Our committed team of staff and member districts contributed to a dynamic and successful year at Assabet Valley Collaborative.

As I look back on 2014-2015, three major themes come to mind that permeated every priority and initiative within our organization: **Self-Reflection & Openness to Feedback & Growth, Data to Measure & Understand our Work and Leveraging Diverse Viewpoints to Increase Inclusive Supports**— all leading to Continuous Improvement within our organization and in support of our member districts. Please see highlights on the following page for evidence of these themes throughout the year in our programs, professional development and district initiatives.

“Alone we can
do so little;
together we can
do so much.”

-Helen Keller

Highlights and achievements of our programs and services will be described more fully throughout the rest of this report. Each program and service (special education programs, special education transportation, professional development, consultation and wraparound services) will be described in each section including a discussion of the cost effectiveness or value the particular program or service brings to our districts and communities.

It is important to note that while there are many elements of membership at AVC that result in clear cost savings and efficiencies, there are many other benefits of membership that are related to supporting core values, inclusion, collaboration with peers and quality collective inquiry. This document will strive to highlight both the tangible cost efficiencies available to members as well as the intangible value-added benefits that come with being an active member of the AVC community.

Thank you for your contributions to our work at AVC. We rely on active and engaged districts, parents, staff and community members - because we can do so much when we do it together.

With gratitude,

Cathy Cummins
Executive Director

“The Collaborative
is an integral
and a necessary
part of how we
succeed in our
district.”

*- Member district Special
Education professional*

Educating and empowering all learners

HIGHLIGHTED THEMES

Self-Reflection & Openness to Feedback & Growth

In June 2014, while partaking of my summer leadership reading, I stumbled across the following quote from Stone & Heen's *Thanks for the Feedback*: "Nothing affects the learning culture of an organization more than the skill with which its executive team receives feedback."

This book was used throughout a variety of initiatives at AVC:

- Required reading for AVC leadership
- Copy provided to all AVC staff
- Book study in job-alike groups with member districts
- Used to support gathering and making use of staff and student feedback
- Launched comprehensive trainings in Dialectical Behavior Therapy (DBT) to support interpersonal effectiveness within teams and in support of direct services to students and families

Data to Measure & Understand our Work

In 2014-2015 – AVC undertook several initiatives related to collecting data to assess and inform changes to our practices:

- Awarded DESE grant to support member district principals in developing measures to assess their leadership practice
- Provided comprehensive training and consultation to AVC staff related to writing measurable and meaningful goals for students (IEPs), for professional learning (SMART goals) and for program and organizational improvement priorities
- Implemented data collection tools (through Risk-Eraser) to improve student time on learning, individual student growth and goal attainment, district and family satisfaction and progress toward program and organizational goals

Leveraging Diverse Viewpoints & Expertise to Increase Responsive Services

- Provided robust, comprehensive training to 37 AVC staff and member districts in Unpacking Cultural Proficiency
- Required reading of leaders: *Cultural Proficiency: A Manual for School Leaders*
- Collected staff feedback about culturally proficient leadership practices
- Facilitated study through Peer Review project related to supporting Mental and Behavioral Health in schools
- Opened Marlborough campus of Evolution program to provide geographic options as well as to increase capacity to serve more diverse range of students as they transition to adulthood
- Added Transition Specialist Consultant supporting districts in improved transition services for students nearing adulthood
- Hired Child Psychiatrist to support AVC programs and member districts in better supporting the needs of students with mental health needs



MISSION

Assabet Valley Collaborative partners with students, families and member school districts to deliver highly-specialized expertise and resources to foster empowerment of all learners.

VISION

AVC is deeply committed to bringing communities together to maximize diverse resources to provide the best services to children, families and our region. Through collaboration and partnership we strive to map resources, identify needs and develop and support services that will effectively and efficiently address evolving needs in our member school district communities.

“All labor that uplifts humanity has dignity and importance and should be undertaken with painstaking excellence.”

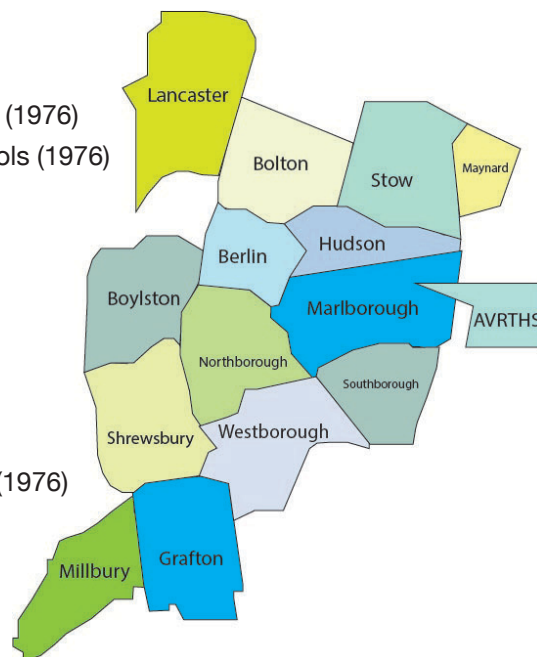
~Dr. Martin Luther King, Jr.

BOARD OF DIRECTORS 2014-2015

Ernie Houle	Assabet Valley Regional Technical High School
Nadine Ekstrom	Public Schools of Berlin and Boylston
Jay Cummings	Grafton Public Schools
Jodi Fortuna	Hudson Public Schools
Richard Langlois	Marlborough Public Schools
Robert Gerardi	Maynard Public Schools
Gregory Myers	Millbury Public Schools
Michael Wood, Chair	Nashoba Regional School District
Christine Johnson	Public Schools of Northborough and Southborough
Joseph Sawyer, Vice-Chair	Shrewsbury Public Schools
Amber Bock	Westborough Public Schools

AVC MEMBER DISTRICTS

Assabet Valley Regional Technical High School (1976)
 Berlin, Boylston & Berlin-Boylston Public Schools (1976)
 Grafton Public Schools (voting member 2015)
 Hudson Public Schools (1976)
 Marlborough Public Schools (1976)
 Maynard Public Schools (1976)
 Millbury Public Schools (2011)
 Nashoba Regional School District (1976)
 Northborough, Southborough &
 Northborough/Southborough Public Schools (1976)
 Shrewsbury Public Schools (1976)
 Westborough Public Schools (1976)



SENIOR LEADERSHIP TEAM 2014-2015



Cathy Cummins
Executive Director



Anne Mahan
Assistant Executive Director
of Finance and Operations



Nancy Ahrabi-Nejad
Director of
Consultation Services



Karen Laskey
Director of
Satellite Programs



Susan Donofrio
Co-Director of
Therapeutic Programs



Shannon Vander Swaagh
Co-Director of
Therapeutic Programs

The Collaborative's Advisory Committees meet monthly to collaborate, share expertise and make recommendations to our Board of Directors to identify areas of growth and need. The members of these committees are listed below.



ADVISORY COMMITTEES

2014-2015

OPERATING COMMITTEE MEMBERS

Jill Greene

Chair, Maynard Public Schools, Director of Student Services

Charla Boles

Assabet Valley Regional Technical High School, Special Education Coordinator

Karen Molnar

Berlin-Boylston Public Schools, Director of Pupil Personnel

Arnold Lundwall

Grafton Public Schools, Special Education Administrator

Catherine Kilcoyne

Hudson Public Schools, Director of Pupil Services

Heather Geary

Marlborough Public Schools, Director of Special Education

Kate Ryan

Millbury Public Schools, Director of Pupil Personnel

Tracy Conte

Nashoba Regional School District, Director of Special Education

Barbara Goodman

Northborough/Southborough Public Schools, Director of Student Support Services

Linda Andrews

Northborough/Southborough Public Schools, Asst. Director of Student Support Services

Melissa Maguire

Shrewsbury Public Schools, Director of Pupil Personnel

Meghan Bartlett

Shrewsbury Public Schools, Out of District Coordinator

Sherrie Stevens

Westborough Public Schools, Director of Pupil Personnel

COOPERATIVE SERVICES ADVISORY COMMITTEE MEMBERS

Rick Bedard

Chair, Millbury Public Schools, Business Manager

Kristopher Luoto

Assabet Valley Regional Technical High School, Director of Business Operations

Julie Surprenant

Berlin-Boylston Public Schools, Business Manager

Daniel Gale

Grafton Public Schools, Director of Finance

Patricia Lange

Hudson Public Schools, Director of Finance

Michael Bergeron

Marlborough Public Schools, Business Manager

Peter DiCicco

Maynard Public Schools, Business Manager

George King

Nashoba Regional School District, Assistant Superintendent

Cheryl Levesque

Northborough/Southborough Public Schools, Director of Business

Cecelia Wirzbicki

Shrewsbury Public Schools, Director Of Business Services

Irene Oliver

Westborough Public Schools, Director of Finance & Administration

“Never doubt that a small group of thoughtful, committed, citizens can change the world. Indeed, it is the only thing that ever has.”

- Margaret Mead

History

Assabet Valley Collaborative

The Assabet Valley Collaborative (AVC), an educational service agency located in Central Massachusetts, was established in 1976. An educational service agency is a regional public multiservice agency (not a private organization), authorized by state law to develop, manage and provide services or programs to local education agencies, such as public school districts. In the Commonwealth of Massachusetts, Education Collaboratives were formed by local school committees and charter boards under Chapter 40, Section 4E (1974). On 2 March 2012, Governor Deval Patrick signed into Session Law, Chapter 43 of the Acts of 2012: An Act Relative to Improving Accountability and Oversight of Education Collaboratives. The purpose of an educational collaborative is to supplement and strengthen the programs and services of member school committees and charter boards.

The purpose of our Collaborative is to provide:

- Specialized education programs and services for students ages 3 up to 22
- Special education transportation services
- Professional development, training and resource sharing
- An array of consultative services
- Cooperative purchasing/procurement services
- Cost-effective responses to needs articulated by member districts

The focus of our collaborative is the development and delivery of high-quality programs and/or services to member districts that shall complement and strengthen those provided by member school committees.

The overall objectives include:

- The creation and/or delivery of cost-effective responses to needs articulated by member districts
- The delivery of high-quality, specialized education programs and services for students ages 3 up to 22
- The delivery of cost effective and efficient special education transportation services
- The development and delivery of high quality and cost-effective consultative services

- The development and delivery of high quality and cost-effective professional development, training and resource sharing
- The provision of effective and efficient cooperative purchasing/procurement services

Legal Autonomy and Fiscal Independence:

AVC was established and governed pursuant to the provisions of Chapter 40, Section 4E of the General Laws of the Commonwealth of Massachusetts and Session Law, Chapter 43 of the Acts of 2012: An Act Relative to Improving Accountability and Oversight of Education Collaboratives.

AVC's operations are funded by membership fees, tuitions and rates for educational and contractual services provided. Rates are calculated as part of the annual budgeting process for each program based on enrollment and projected participation. Our Board Members are responsible for ensuring that any borrowing, loans or mortgages are cost effective and necessary to carry out the purposes for which the collaborative is established. They approve all expenditures, including, but not limited to contracts, borrowing and the purchase and sale of fixed assets.



BENEFITS OF MEMBERSHIP

Membership at Assabet Valley Collaborative provides access to the following benefits:



1 Receive member discounts

All AVC programs and services are provided to members at membership rates. Non-member districts may also access AVC programs and services at a 12%-15% surcharge. Membership pricing is generally competitive with similar, private vendors resulting in cost efficiencies. Services and programs are also designed using quality indicators that are based on member feedback and guidance; members rely on AVC to provide high-quality services that also maximize local resources through working with neighboring districts.

2 Influence and guide decision making

Member districts influence and guide decision-making regarding adding programs, improving the quality of services and pooling resources with neighboring districts. AVC has started several new programs since 2008 based upon member district input about needs, including a middle school program for students with emotional/behavioral needs, a 45-day assessment program, 18-22 vocational program, wraparound services, transition programming and child psychiatry.

3 Obtain cooperative/volume purchasing advantages

Members have access to Cooperative/Volume Purchasing through collective procurement activities. AVC procures goods and services on behalf of member communities, resulting in more competitive pricing for goods districts need to purchase. In FY15 AVC contracts included bread and rolls, office supplies, copy paper, school supplies, technology and transportation services.

4 Gain access to grant-funded initiatives

Members have access to grant-funded initiatives through collective, collaborative stakeholder groups. AVC seeks to identify areas of need and to locate grant funding or other sources of revenue to support the launch of new initiatives. AVC's innovative Family Success Partnership was launched in this way, providing community-based wraparound services for area families at no cost to districts in years 2007-2012. In 2014-2015, AVC was awarded the District Determined Measures (DDM) Development Leadership Grant, Fund Code 217, that supported the development of three assessment measures for school-based leaders.

5 Discover Job-Alikes and join initiatives opportunities

Members have access to Job-Alikes and joint initiatives for district faculty. Through joint initiatives, member districts share expertise, pool resources to increase capacity, collaborate on new regulations and mandates, and launch innovations and projects to improve public education in our region. See the summary of Peer Review initiative for one robust, value-added way that the Job-Alike for special education administrators has added value to member districts.

6 Enrollment in neighboring district specialized programs

Enrollment in neighboring districts specialized programs is possible due to the collective and collaborative partnerships fostered through membership at AVC. Districts can expand each other's capacity to provide public school specialized programs through tuition agreements between districts for special education programs in the least restrictive environment.

The following Table highlights AVC's progress in 2014-2015 in achieving the purposes articulated in the existing Collaborative Agreement.

PROGRESS IN ACHIEVING PURPOSE

Programs/Services which "shall complement and strengthen member school committees and increase educational opportunities for children ages 3-22."	Progress towards Purpose in FY15
Specialized education programs for students ages 3-22	AVC continued to provide specialized programs as noted in the sections of this report describing programs. Student enrollment in programs in 2014-2015: 107 students (pages 9-19).
Services provided to students aged 3-22 (transportation, therapy, counseling, supports)	AVC provided consultation therapy services to over 150 students from 10 member districts and 2 nonmember districts (pages 16-19). AVC transported 378 students in 2014-2015 from 30 districts (page 22).
Joint/cooperative or volume purchasing according to Chapter 30B as well as joint/cooperative purchasing through intergovernmental agreements	AVC joint purchasing for office supplies, copy paper and school supplies resulting in an estimated \$215,383 in cost savings to districts. Additional cooperative purchasing contract awards included technology services and bread and rolls (pages 23-24).
Services delivered to member school community staff - including training, professional development, consultation, or other service	AVC provided 127 contact hours of training to over 600 participants through targeted professional development activities. AVC's Family Success Partnership (FSP) delivered wraparound services to 6 districts servicing 126 families (pages 18-20).
Development of partnerships with community and state agencies to enhance support to member districts	AVC convenes community and state agencies and continues to be a leader in systems of care meetings and task forces related to mental health, transition services and inclusion (pages 18-19 FSP wraparound).
Joint initiatives including inter-district projects, research, task forces, etc.	AVC convened over 50 job-alike meetings for district administrators including Superintendents, Special Education Administrators, Business Administrators, Curriculum Leaders and Technology Leaders. Job-Alike meetings resulted in resource sharing, joint initiatives, projects and collaboration (page 21).
Joint hiring or job sharing for low incidence personnel	AVC shared position of Educational Technology Specialist – shared between AVC and a member district for FY15.
Application for grants or other sources of funding for programs that may include state agencies, community-based partners, etc.	AVC continued to seek grant-funding and partnerships with community agencies to support sustainability of wraparound services. As a result of this, AVC received funding from Sudbury Foundation to expand upon the previous year's cost-avoidance study as well as funding from CF Adams for the Training Resource Initiative for School Communities (pages 18-19).
Application for grants or other sources of funding to operate programs for individuals that complement the mission and vision of the Collaborative	AVC secured competitive and state grant funding to support AVCAS's expressive therapies programming (page 12) and District Determined Measures.

PERFORMANCE REPORT UPDATE

AVC continued a recent trend of significant growth in FY15, which has been increasing capacity, operating budget and enrollment since significant turnaround activities took place in 2007-2008. The following charts provide a graphic representation of AVC's enrollment growth in recent history and revenue sources for FY15.

Figure 1 displays revenue sources for the past fiscal year. Direct Support Services to our member districts students, families and district educators account for over 99% of our revenues. These services include special education programming, consultation and therapeutic services, wraparound services, transportation and professional development. Figure 2 reflects more recent (2008-2015) student enrollment trends by program.

Figure 1

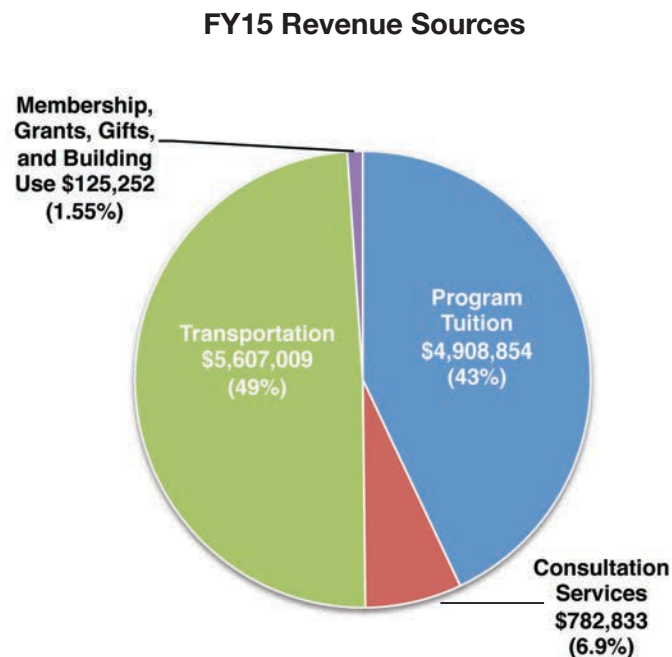
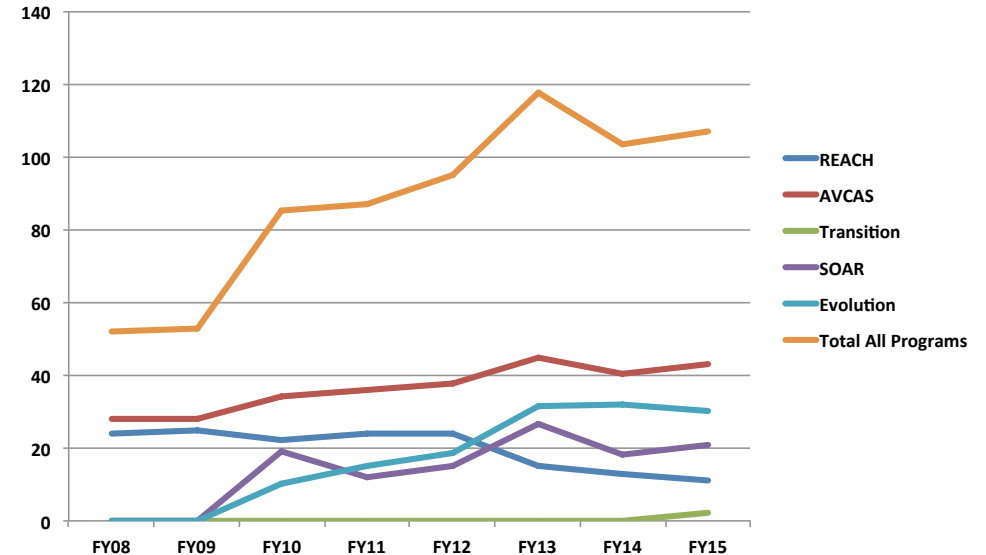


Figure 2

**Student Enrollment by Program
FY08-FY15**



REVENUE SOURCES	FY15 REVENUE	
Program Tuition	\$4,908,854	43%
Consultation Services	\$782,833	6.9%
Transportation	\$5,607,009	49.1%
Membership, Grants, Gifts, and Building Use	\$125,252	1.55%

	FY08	FY09	FY10	FY11	FY12	FY13	FY14	FY15
Reach	24	25	22	24	24	15	12.73	10.93
AVCAS	28	28	34	36	37.6	44.62	40.52	42.85
Transition							0	2.02
SOAR	0	0	19	12	15	26.62	17.91	21.11
Evolution	0	0	10	15	18.5	31.46	32.1	30.2
Total All Programs	52	53	85	87	95.1	117.7	103.26	107.11

"FSP has been a saving grace for the families that I have referred" They are "so organized, communicative and the follow through is immediate."

- School Counselor



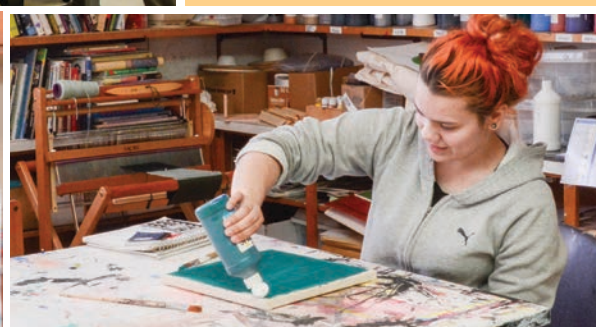
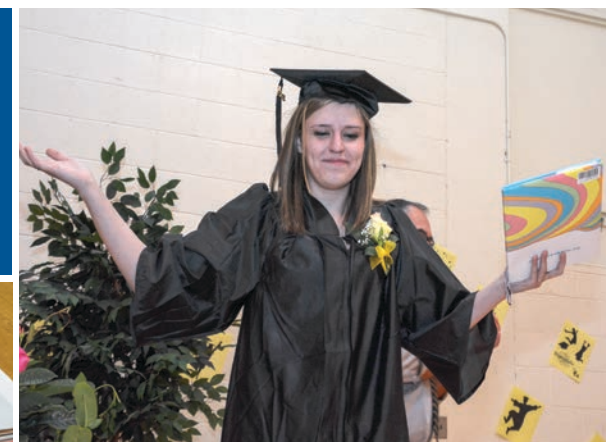
"FSP has bridged the gaps between school, home and community."

- School staff



"Was completely satisfied and made a huge difference in our family."

- Parent



"Thank you for all that you did for my daughter... (she) benefited from all the services you provided in a collaborative effort... She graduated from high school and is (now) enrolled in community college... and planning on getting a degree in (teaching). I am grateful for all you did to make a difference to us both!"

- Parent AVCAS Graduate

"Gabby is outgoing, funny and is always happy when she is here. She is always willing to help with anything we do."

-CHAPS staff

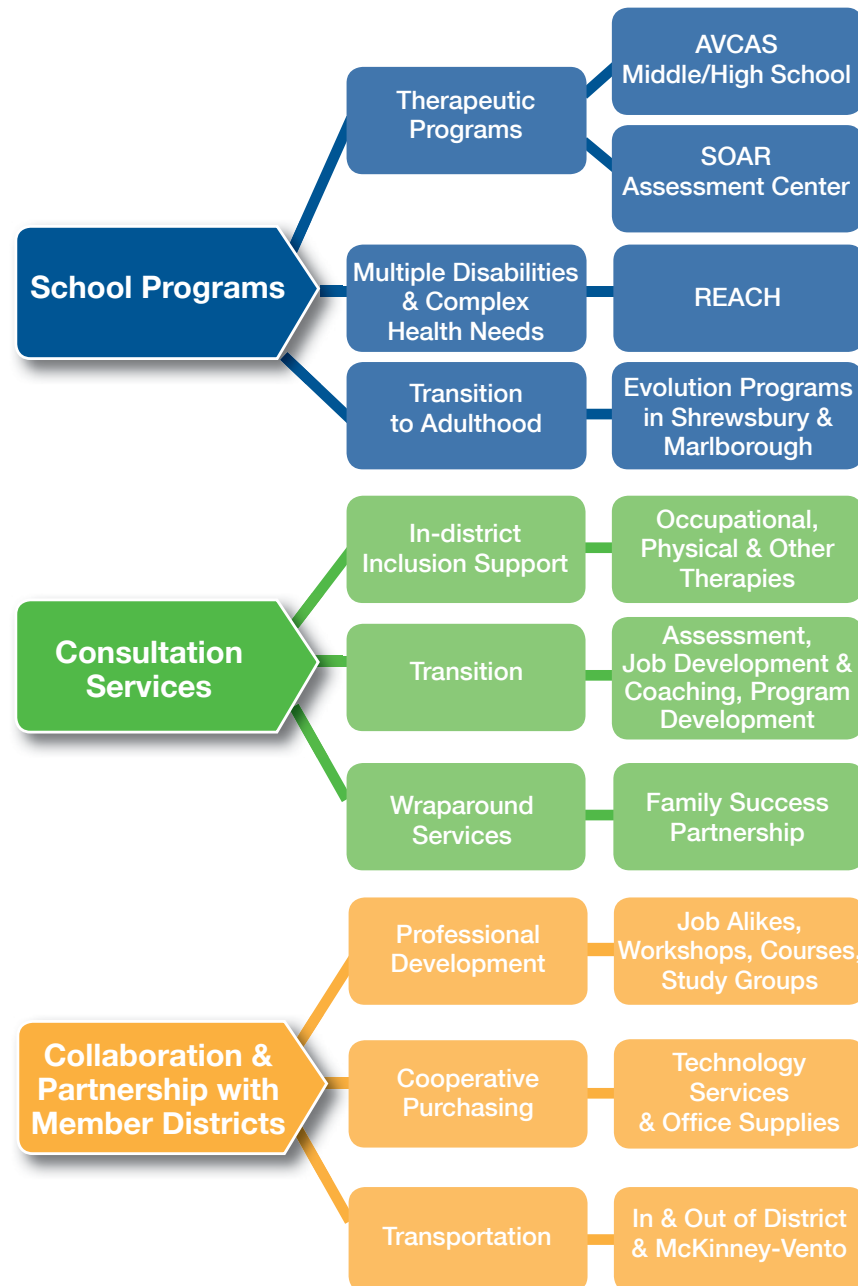




Assabet Valley Collaborative (AVC) provides unique, high-quality services to empower students, families and districts to overcome obstacles and achieve their goals. Our licensed and experienced educators and related staff are ready to support students with social/emotional, intellectual and/or physical needs.

AVC takes a multi-dimensional approach to promoting student success, family support and community integration. Through partnership and collaboration, we pool resources, identify needs and create programs to effectively and efficiently support and address the evolving needs of our students, their families and our districts. Our services are in the categories of school programs, consultation services and district collaboration.

COLLABORATIVE OFFERINGS





ACHIEVEMENTS

- Annual music performance and art show
- Gay-Straight Alliance NOH8 (No Hate) Campaign to promote rights and inclusiveness
- Graduated 6 seniors
- Enrollment growth in SOAR
- Expressive Arts programming supported through Massachusetts Cultural Council "Self-Titled Life" mural
- Student Council activities
- Animal-assisted activities
- YMCA membership for students
- NYPUM (National Youth Project Using Minibikes) program
- Intramural basketball programming
- Art and Music Therapy internship programs
- Therapeutic Horseback Riding
- Professional Development for staff in Cultural Proficiency, DBT, Restorative Discipline and Collaborative Problem Solving
- Google apps for education implementation
- Child Psychiatrist added to team

TUITION 180 DAYS	MEMBER RATE	NONMEMBER RATE	MEMBERSHIP SAVINGS
AVCAS	\$45,440	\$50,893	\$5,453

Assabet Valley Collaborative Alternative School (AVCAS)

PURPOSE

Our therapeutic day school offers academic rigor and clinical services to students in grades six through twelve who are experiencing emotional, learning and behavioral difficulties. Programming includes a strong emphasis on academics, clinical services, expressive arts, vocational supports and high-interest electives. AVCAS supports students in overcoming challenges related to mental and behavioral health to achieve individualized goals. AVCAS staff collaborate with students, families, sending school districts, state agencies and community mental health providers to ensure that students are supported during the school day as well as beyond the scope of the school day when indicated. Programming includes:

- Small instructional groups led by master's level professionals
- Integration of academics, expressive therapy and transition skills
- Tiered behavioral support model builds skills and relationships

VALUE

AVCAS provides a regional option for students who may otherwise be referred for private school placements further from the home community. AVCAS is invested in supporting students in returning to their home district and working with the member districts to build the capacity to support the needs of students with social and emotional disabilities. AVCAS' expressive therapy programs and high-interest electives add value to comprehensive academic and clinical therapeutic setting. In 2014-2015, AVCAS added online courses, added Student Council and started the Gay-Straight Alliance – all components of diversifying offerings and increasing student empowerment and engagement.

FISCAL YEAR	ENROLLMENT MEMBER DISTRICTS	TOTAL ENROLLMENT NONMEMBER DISTRICTS	TOTAL STUDENT ENROLLMENT
2015	22	38 (21*)	61
2014	28	29 (20*)	57
2013	28	41 (32*)	69
2012	23	27 (23*)	50

*Total ACCEPT Education Collaborative student enrollment

Co-Directors of Therapeutic Programs: Susan Donofrio & Shannon Vander Swaagh
AVC- Marlborough, 57 Orchard Street, Marlborough, MA

SOAR - 45 Day Assessment Program

PURPOSE

Jointly operated by Assabet Valley Collaborative and ACCEPT Education Collaborative, Short Term Option for Assessment and Recommendations – SOAR – is a short-term stabilization and diagnostic assessment program for middle and high school students (grades 6-12). Our team collaborates closely with parents and districts to identify appropriate academic and clinical supports for students with social/emotional difficulties. We help teams better understand the skills and needs of our students to identify supports and strategies that will enable our students to progress in the least restrictive environment. Program features include:

- Customized educational and clinical assessments
- Individualized academic and clinical services
- Comprehensive reports and recommendations

VALUE

SOAR is housed in the same building as AVCAS which provides access to services, expertise and facilities not typically found in other 45-day assessment programs – including comprehensive academic support, music, art and other elective teachers, physical education and clinical support services. In addition, AVC's partnership with area clinical providers enables us to pass cost savings in clinical evaluations on to districts. SOAR staff is committed to supporting districts in responding to referral questions and identifying recommendations to support the student's need in the least restrictive environment. Because of the diversity of expertise available within AVC faculty, SOAR can serve a wide range of students – many of whom are transitioning from more restrictive settings like hospitalizations or residential settings and many of whom are referred because of incidences or crises at home or school.

FISCAL YEAR	ENROLLMENT MEMBER DISTRICTS	TOTAL ENROLLMENT NONMEMBER DISTRICTS	TOTAL STUDENT ENROLLMENT
2015	10	7 (4*)	17
2014	6	10 (7*)	16
2013	7	10 (8*)	17
2012	7	9 (7*)	16

*Total ACCEPT Education Collaborative student enrollment

Co-Directors of Therapeutic Programs: Susan Donofrio & Shannon Vander Swaagh
AVC- Marlborough, 57 Orchard Street, Marlborough, MA



ACHIEVEMENTS

- Annual music performance and art show
- Expressive Arts programming supported through Massachusetts Cultural Council- "Self Titled Life"
- Art and Music Therapy internship programs
- Google Apps for Education implementation
- Cultural Proficiency
- Child Psychiatrist added to team
- Launched intensive training in DBT in Schools
- Animal-assisted activities

TUITION 45 DAYS	MEMBER RATE	NONMEMBER RATE	MEMBERSHIP SAVINGS
SOAR	\$12,233.95	\$13,702	\$1,468.05



ACHIEVEMENTS

- Community-based instruction
- Adapted Yoga
- Animal-assisted activities
- Nursing students
- Quarterly newsletter for families and member districts
- Waiting list for typical peers reverse inclusion volunteers
- Community Service projects included: Preparing care packages for UMASS Memorial Children's Medical Center, Department of Oncology

REACH Program*

PURPOSE

REACH provides a multidisciplinary approach to meet the varied and complex academic, therapeutic and healthcare needs of students with multiple disabilities between the ages of 9 and 18. REACH infuses social communication throughout programming with a particular emphasis on assistive technology and augmentative communication. Our classrooms are equipped with educational technology including Promethean Interactive Whiteboards. Our classes include:

- Embedded Speech/Language, Physical, Occupational, Vision and Music Therapies
- Comprehensive nursing support
- Inclusion opportunities with typical peers
- Art, cooking, adaptive physical education, music and animal-assisted activities

“Nobody can do everything, but everyone can do something.”

- Max Lucado

VALUE

AVC's REACH program provides a high quality, cost effective alternative to enrollment in private schools that are further away from our students' home communities. Although quality and cost are important considerations, geography and inclusion are vital to the value AVC's REACH classrooms offer our students, particularly from Member districts; most private placements are in the Metro Boston area that add travel time (during heavy commuting hours) and increased costs for districts. AVC's REACH classrooms are housed in public school settings, which add the value of inclusion opportunities with peers in the host school community as well as being able to participate in home community activities.

FISCAL YEAR	ENROLLMENT MEMBER DISTRICTS	ENROLLMENT MEMBER DISTRICTS	TOTAL STUDENT ENROLLMENT
2015	8	5	13
2014	7	7	14
2013*	8	7	15
2012	17	8	25

*REACH Crossroads program formerly serving students ages 18-22 merged with Evolution in FY13 resulting in a decrease in enrollment in REACH.

TUITION 204 DAYS	MEMBER RATE	NONMEMBER RATE	MEMBERSHIP SAVINGS
REACH	\$70,945	\$79,459	\$8,514

Director of Satellite Programs: Karen Laskey

REACH II: Trottier Middle School, 49 Parkerville Road, Southborough, MA (Ages 10-14)

REACH III/IV: Algonquin Regional High School, 79 Bartlett Street, Northborough, MA (Ages 14-18)

Evolution Program

PURPOSE

The Evolution Program is available in our Shrewsbury and Marlborough locations. This transition program is designed for students ages 18-22 who continue to be eligible for educational services as they transition to adulthood.

Evolution blends educational opportunities within real world settings in the community. Our programming includes:

- Transition assessment, job development and job coaching
- Community-based instruction – Travel training, fitness, college coursework, shopping, recreation
- School-based instruction–healthy relationships, cooking, finance, laundry, hygiene

VALUE

Evolution opened in 2009 with 9 students; in the next few years, the enrollment tripled requiring the program to locate to a larger space – cofounded through a partnership with Shrewsbury Public Schools. In 2014, Evolution opened a satellite campus in Marlborough to provide additional expanded options geographically and programmatically. Because Evolution connects students with local community-based opportunities, it increases the likelihood that our young adult students will stay connected with those resources when they leave Evolution by graduating or turning 22. Evolution served over 30 students 2014-2015.

FISCAL YEAR	ENROLLMENT MEMBER DISTRICTS	ENROLLMENT MEMBER DISTRICTS	TOTAL STUDENT ENROLLMENT
2015	29	7	36
2014	32	3	35
2013*	31	3	34
2012	18	0	18

*REACH Crossroads program formerly serving students ages 18-22 merged with Evolution in FY13 resulting in a decrease in enrollment in REACH.

Director of Satellite Programs: Karen Laskey
Shrewsbury High School, 64 Holden Street, Shrewsbury, MA
AVC-Marlborough, 57 Orchard Street, Marlborough, MA



ACHIEVEMENTS

- Quinsigamond Community College Coursework
- Added Evolution Marlborough site – new programming serves special education students who have completed 12th grade whose IEP teams have identified a need for additional post-graduate vocational/transitional program.
- Digital Footprint instruction
- Community gardening
- Garden-to-Table activities
- Published Evolution *Edibles* Cookbook
- Cooking-For-One classes
- Competitive employment
- Community service
- Wraparound services
- Family workshops
- United Way Volunteer Of The Year student award
- After-school social events, “Friday Night Out”
- Community-based instruction
- Quarterly newsletter for families and member districts
- Community service projects included: Preparing care packages for UMASS Memorial Children’s Medical Center, Department of Oncology, food donations to Rachel’s Table, volunteer at Charity Golf Tournament

TUITION 180 DAYS	MEMBER RATE	NONMEMBER RATE	MEMBERSHIP SAVINGS
Evolution Tier 1	\$31,245	\$34,995	\$3,750
Evolution Tier 2	\$46,350	\$51,912	\$5,562
Evolution Tier 3 (204 days)*	\$70,945	\$79,459	\$8,514

*Formerly REACH/Crossroads

ACHIEVEMENTS

- iPads for therapeutic service delivery
- Partnerships with state-wide organizations to support inclusion and professional development
- Vocational assessments
- Child Psychiatrist Consultation and Professional Development
- Community partnerships developed to expand district vocational opportunities
- Transition Partners: Algonquin Regional High School, Maynard and Hudson High Schools
- Competitive employment and internship secured for transition students
- Adaptive equipment trainings for medically fragile students
- Whole-class yoga instruction
- Physical Therapy Assistant Internship
- Staff Training – Integration of Motor and Sensory Learning

HOURLY CONSULTATION	MEMBER RATE	NONMEMBER RATE	MEMBERSHIP SAVINGS
Occupational Therapy, Physical Therapy, Speech/Language, Assistive Technology, Music Therapy, Social Work/Counseling	\$84.66	\$94.82	\$10.16
Therapy Assistants – PTA, COTA, SLP	\$56.44	\$63.21	\$6.77

OVERVIEW

Assabet Valley Collaborative Consultation Services offer our member districts expertise and assistance to address a wide range of therapeutic needs for students and families. We provide a variety of related services that include:

- Highly-trained staff
- Programs designed to address specific students needs
- Collaborative and flexible scheduling and consultation



In-district Inclusion Support

AVC employs a range of experts with particularly specialized training and credentials that helps to support the low-incidence needs in member districts. Additionally, AVC's consultants are committed to integrated services and expanding the capacity of our member districts to provide increasing support to students in their home districts in the least restrictive setting.

Our inclusion supports include direct student assessments and evaluations, developing and implementing individual /group programs and providing consultation to district staff, parents or teams. FY15 offerings:

- Occupational Therapy
- Physical Therapy
- Music Therapy
- Psychiatric Consultation—medication awareness, accessing resources, crisis guidance and Professional Development

FISCAL YEAR	THERAPEUTIC STAFF	DISTRICTS SERVED	STUDENTS SUPPORTED
2015	11	12	300+
2014	8	10	250+
2013	10	10	300+
2012	8	10	300+

STUDENT POEM

I may be small but you know I matter...
 You taught me, you cared for me,
 and you believed in me...
 Your guidance provided me a path...
 As I grow up, each of you will have
 been a critical part of the amazing
 person I ultimately become!

Director of Consultation Services: Nancy Ahrabi-Nejad
 AVC- Marlborough, 57 Orchard Street, Marlborough, MA

Transition

FY15 marks the first year of offering transition specialists and job coaching consultation. We support our districts in improving services provided locally to students in various stages of transitioning to adulthood. Services are provided directly to students and/or district staff and include:

- Transition/Vocational Assessments
- Interest Inventories
- Job Development
- Job Coaching
- Staff training
- Program Evaluation
- Program Development



I have had the privilege to work for AVC, providing programming and student interventions within schools of our member districts, for 17 years. AVC has always been an agency that has responded to the evolving needs of our member districts. I love collaborating with our highly professional staff, leveraging their expertise and experience to create programs that promote student learning and engagement in the least restrictive environment. We are ever evolving and changing.

We problem solve outside of the box. Over the past few years, we have been creatively supporting several member districts with a highly qualified music therapist. We have added to our staff a Transition Specialist who has received from DESE the Transition Endorsement and who not only has years of experience providing transition programming within public schools but also working in adult agencies. We have clinical staff available to provide student assessments in the domains of psychology, transition, physical and occupational therapy. There is never a day when we are not striving to do our best for our most fragile learners; it is exciting and fulfilling work!

Nancy Ahrabi-Nejad
Director of Consultation Services

AVC Success Story

AVC Student honored as United Way Tri-County Volunteer of the Year

Gabby has been working in the CHAPS Preschool Program in Hudson, Ma. She has volunteered over 200 hours with preschool students ages 2.9-5 years old. During this time Gabby has worked hard to grasp the natural cues/supports in the school environment. She is able to work independently, take initiative to set up snacks, sweep, wipe the tables, set up games/puzzles and sits down with the students and engages with them. The staff says you can always find Gabby sitting on the carpet playing and smiling with the children. It is normal practice to see her with a book and a few children sitting with her looking at her as a mentor.

With all her hard work Gabby was nominated by CHAPS and received United Way's Volunteer Of the Year Award! We are so proud of her. The United Way's Volunteer Of The Year award recognizes local do-gooders for their commitment to volunteerism and passion for creating positive change in the community.



“ Gabby wants to be here and be a part of our team. She is eager to learn more about how to be helpful within the classroom. She is an asset to us! ”

- CHAPS staff

Family Success Partnership (FSP)

PURPOSE

Family Success Partnership (FSP) is a family-centered wraparound program designed to support students and their families who have needs that fall outside of school services that have not yet been met by community or state agency services. Each family participating in FSP is unique and Family Support Counselors (licensed mental health professionals) help each family develop goals and then help them identify resources needed to achieve those goals. FSP is there to help families navigate the complicated web of insurance, state agency applications and waitlists – to help add resources to families who need them. FSP is one of the only school-based wraparound programs in Massachusetts.

VALUE

The 2014-2015 school year was one of significant transition for Family Success Partnership (FSP), with changes in leadership of the department, an increase in tools and skills for data analysis and shifts in the field of public education that resulted in more districts being interested in contracting with FSP for school-funded wraparound services. In September 2014, Attorney Paige Tobin completed her review of state and national case law about wraparound services and schools and concluded her review with the following statement: “These cases clearly demonstrate that well-coordinated, thoughtful wraparound services often allow a student to avoid residential placement, continue to be educated in the least restrictive environment and continue to reside within the home.” In March 2015, FSP concluded the work they began in 2009 with independent evaluators from Evaluation Services – who assisted FSP in developing tools to display the value, benefit and outcomes of the program. Generously funded by the Sudbury Foundation, the multi-year independent evaluations were initially designed to assist FSP in articulating the benefits of wraparound as the program transitioned from being fully grant funded* (2007-2012) to being funded by school districts. During 2014-2015, the needs of the independent evaluation shifted – away from needing to make a case for districts to fund the service and toward better understanding complex outcomes and metrics for success of the program.

From 2009-2014, the evaluators note that FSP served 314 cases.

Evaluators reviewing data over the 5 school years included in the study, wrote, “as reported by school professionals conducting the assessments, students served by FSP were assessed as having less frequent and less severe challenges associated with scores (designed to assess distractibility, hyper arousal, verbal & physical aggression and mental health).” Evaluators also concluded, “the students with the highest need, on average, also showed the largest improvement in post-scores” noting that these outcomes were statistically significant.

SERVICE	FY15 MEMBER RATES	FY15 NONMEMBER RATES	MEMBER SAVINGS
Phase I	\$27,500	\$30,800	\$3,300
Phase II	\$55,000	\$61,600	\$6,600
Phase III	\$82,500	\$94,876	\$12,375



ACHIEVEMENTS

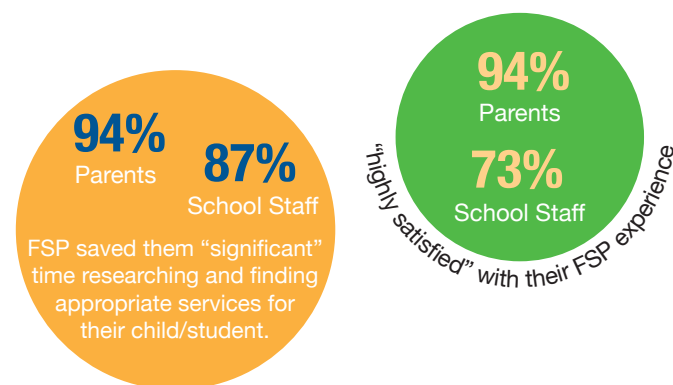
- 30% increase in caseload from previous school year
- Continued funding from Sudbury Foundation made the following evaluation and capacity-building activities possible:
 - *Wrap Around Services – Case Law Summaries* written by Paige Tobin, Esq. of **Murphy, Lamere & Murphy, P.C.**
 - Data Consultation provided by Dr. Anita Baker and Dr. Marc Hauser resulted in the following:
 - Parent and school staff satisfaction survey developed & administered & analyzed
 - Refinement and improvement of pre- and post- assessments for students and their families
 - Streamlining of referral forms and process
 - Annual reporting template
- Project funding from CF Adams Charitable Trust to support training series for FSP schools – The Training Institute – by partnering with Children’s Hospital Neighborhood Partnerships and Massachusetts Advocates for Children.

FSP also benefitted greatly from exciting changes in the field of public education in 2014-2015, most notably a shift in the readiness and investment of public education institutions to support mental and behavioral health needs in school. In August 2014, the Massachusetts Budget and Policy Center and the Rennie Center published *Uplifting the Whole Child: Using Wraparound Services to Overcome Social Barriers to Learning*. This article captured a great deal of the information we had been working on with our evaluators to convey in the last few years. As FSP has become more skilled in demonstrating our outcomes and articulating the value our unique services bring to our districts, the field of public education has also become more invested in this domain. It is no coincidence then, that going into the 2015-2016 school year, FSP will add two full-time social workers to address increased requests for wraparound services in existing and new school districts.

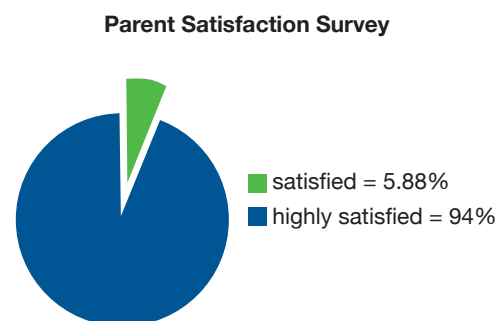
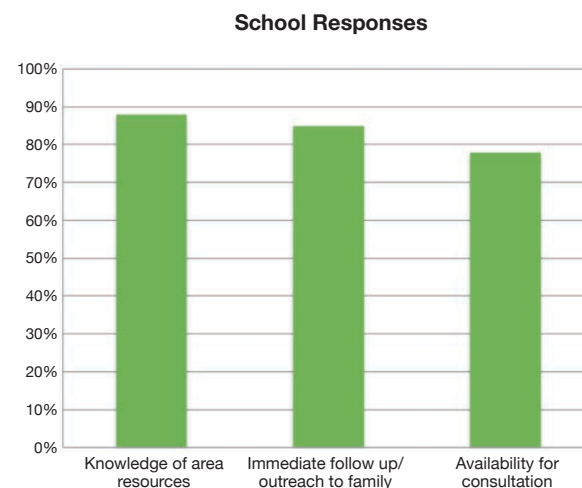
Our FSP staff express feeling far more confident in their data analysis process, our satisfaction survey results show our districts and families find significant value in our work and our stakeholders report that our tools are now much more user-friendly to fill out and to communicate. We have strengthened our data collection skills, our data collection tools and have developed a plan to sustain our outcomes reporting independent of external evaluators.

*Founding grant partners: Metro West Health Foundation, Robert Wood Johnson Foundation, C.F. Adams Charitable Trust Foundation, The Sudbury Foundation jointly funded FSP from 2007-2012 – and supported ongoing activities for sustainability.

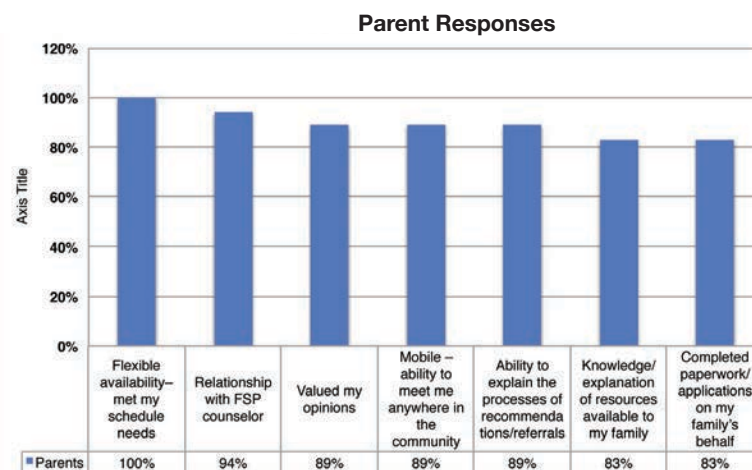
Director of Consultation Services: Nancy Ahrabi-Nejad
AVC- Marlborough, 57 Orchard Street, Marlborough, MA



School Staff Experience Surveys
School staff respondents rated the following features of FSP most helpful:



Parent Experience Surveys
Parent respondents rated they were "highly satisfied" with their FSP experience



ACHIEVEMENTS

The Behavior Code: Practical & Effective Strategies for Students with Anxiety was offered in October 2014 with 77 participants attending. The National Institutes of Health (NIH) reports that one in four 13-18 year olds has had an anxiety disorder in their lifetime. Without intervention, these children are at risk for poor performance, diminished learning and social/behavior problems in school. Understanding the role anxiety plays in a student's behavior is crucial and using preventive strategies are key to successful intervention. Instruction focused on implementing preventive tools, strategies and interventions for reducing anxiety, increasing self-regulation, executive functioning and self-monitoring.

AVC also offered "Autism-ize Your Thinking" workshop for all staff to present strategies for creating comprehensive social emotional plans for students on the spectrum using, [The Connection Formula](#). For the second consecutive year, the professional development calendar included a Social Thinking event: Thinking about YOU Thinking About Me. The workshop explored the process of social communication and perspective taking. Participants learned how to better understand the specific social communication and academic needs of their students/children. Social Thinking and Transition Planning for the Adult World and Real Life emphasized assisting parents, professionals and students themselves to prepare and respond to this transition. Participants were given concrete examples of how to develop a realistic transition plan available to districts and AVC staff providing professional development to special educators, social workers, school psychologists, guidance counselors, etc. The year concluded with Dialectical Behavior Therapy (DBT), Mindfulness & Distress Tolerance workshops for member districts as well as AVC staff.

Professional Development

PURPOSE

In FY15 AVC provided over 127 contact hours of formal training to over 600 participants as part of our commitment to meeting the professional development needs identified by its member districts to improve the quality of their programs and services. AVC provides specialized professional development, connects districts with common initiatives, provides an economy of scale to reduce costs and distance for high priority or mandatory training and customizes workshops to the meet specific needs of districts. The table on the following page highlights activity for this fiscal year.

AVC convenes monthly meetings for member district leaders. The table on the page to the right includes the Job-Alike groups, the priorities/accomplishments and a summary of responses to a survey of group members to rate the value of Job-Alikes during 2014-2015 year.



PD Topic/Initiative	Cost per Participant	Cost to Nonmembers	# of Participants	# of Hours
Responsive Classroom	\$695	\$785	24	28
Educator Evaluation-Administrator	\$120	N/A – not available to Nonmembers	16	12
The Behavior Code	\$135	\$155	77	6
Legal Workshop	\$75	\$85	25	3
Social Thinking-Thinking about you-Thinking about me	\$80-\$105	\$90-\$121	143	6
Social Thinking and Transition Planning for the Adult World	\$80-\$105	\$90-\$121	78	6
DBT Part 1 Intro to DBT & DBT Skills	\$80-\$105	\$90-\$121	52	6
DBT Part II Delving Deeper - DBT Skills	\$150	\$170	52	7.5
Autism-ize your thinking	\$50	\$60	45	3

Job-Alike (Professional Learning Communities)

Group	2014-2015 Topics/Initiatives	Value Ratings and Comments (No Value = 1) (4 = Extremely Valuable)
PPS/Special Education Administrators	<ul style="list-style-type: none"> • IEP Improvement Project • Peer Review – Social/Emotional Learning and Mental Health • Transition services • Restraint/seclusion regulations • Hehir report review • Professional Development • Resource Directory 	<p>8 Respondents: Average Value Rating = 4.0</p> <ul style="list-style-type: none"> • As Sped administrators, we are the only one in our district and the collaborative meetings are so valuable just to learn from each other! • The interactions I have with my colleagues at the job alike lead me to better understand my own work. Directors of Special Education do not have other Directors of Special Education in their districts. The feedback and troubleshooting we do together is invaluable to me and ultimately to the students and families in our district. • The Collaborative is an integral and a necessary part of how we succeed in our district. • The collegial exchange of information is invaluable. The PPS/Special Education Administrators' Operating Committee also takes on many additional initiatives that have impacted our communities.
School Business Officials	<ul style="list-style-type: none"> • Special Education Transportation • ALICE Training & Implementation • Special Education Budgeting • Google Docs training • Facilities & Grounds • Food Service • School Activities Fees 	<p>8 respondents: Average Value Rating = 3.63</p> <ul style="list-style-type: none"> • I have received a lot of good information and assistance during my time as a member of the collaborative. • The job alike is an opportunity to discuss the details of school business management. Many times in our districts, we are the only employee who has the knowledge of the systems we manage, so being able to work with a group of business managers is extremely valuable.
Technology Leaders	<ul style="list-style-type: none"> • 1:1 Device Initiatives • Google Apps for Education • Website Accessibility • E-rate • PARCC • Blended learning • Student Information Systems 	<p>7 respondents: Average Value Rating = 3.57</p> <ul style="list-style-type: none"> • I really appreciate the opportunity to meet with my group. • This Job-Alike has had great leadership over the years. Thank you to Sarah and her predecessors. Also, it is great to visit the other schools and to work collaboratively with other districts. • Share effective practices and strategies, group brainstorming of common challenges, sharing the learning by briefing each other on our individual interest areas, forming strong relationships among districts between like personnel, (and) camaraderie. • We receive updates on new projects and ideas for technology use and integration. We have run several events such as training that would have been prohibitive to do on a district level. • Personally, I feel sharing ideas on devices, budget, ERATE, State Reporting, Curriculum and more is valuable information.
Curriculum Directors	<ul style="list-style-type: none"> • "Thanks for the Feedback" book study • Educator Evaluation • PARCC & MCAS • 1:1 Device Initiatives • Leadership development • Managing mandates while leading for learning 	<p>10 respondents: Average Value Rating = 3.80</p> <ul style="list-style-type: none"> • I appreciate Cathy's leadership very much! • Ability to keep current about initiatives that improve student learning; excellent discussions that result in a better job performance for me; opportunity to build relationships that foster collaboration outside of the meeting times; chance to share resources regarding professional development opportunities. • This network is extremely valuable! There are so many new technology resources and DESE updates / mandates that it is difficult to keep up. It is extremely helpful to problem-solve and strategize situations with like colleagues. • The opportunity to network with other curriculum leaders is invaluable. I have learned so much from my colleagues that I have been able to bring back to my district for further discussion. We have also had the advantage of bringing forward presenters, including DESE, which has allowed us to bring forward important questions that we may not have the time or opportunity to do in other settings. The Job-Alike is an excellent time for shared collaboration. I know that I can always 'phone a friend' when I need some assistance. • The resources we share are invaluable. Professional development opportunities, as well as curriculum ideas. It is also helpful to discuss grants, evaluation and other state initiatives. From this group I have partnered with other districts to offer PD. • Thank you for this great networking support. I am grateful!

Transportation

PURPOSE

AVC provides safe, reliable and cost-efficient special education transportation services by contracting with transportation vendors on behalf of our member school districts. We view transportation as an integral part of each student's education and contract with vendors who share our passion and expertise in serving students with disabilities. Our contract requires vendors to employ highly trained drivers and monitors that drive well maintained and equipped vehicles. AVC leverages volume from many districts; transportation vendors submit competitive rates to AVC resulting in cost savings for special education transportation. In addition, AVC monitors the quality of the services provided, to save districts valuable time and to capitalize on an economy of scale. In FY15, AVC completed its third year of a three-year contract with Van Pool Transportation. While pricing is an important component of the transportation services we provide, our districts rely on AVC to broker services with vendors committed to high quality, flexibility and responsiveness.

Services include:

- In district, out of district, McKinney Vento, field trips, community-based instruction, after school services
- Monitored two-way radios, GPS and video monitoring
- Pre-screened (CORI and fingerprinting) and specially trained drivers and monitors

FISCAL YEAR	STUDENTS TRANSPORTED	MEMBER DISTRICTS UTILIZING SERVICES	NONMEMBER DISTRICTS UTILIZING SERVICES
2015	378	15	15
2014	433	15	16
2013	273	10	8
2012	259	8	11

Transportation	2014-2015 Member Rates	2014-2015 Nonmember Rates	Estimated Member Savings
Single district route: 7d vehicle in-district	\$113.35 within Collaborative Region	\$126.95 Nonmember	\$13.60 per route
Single district route: 7d vehicle out of district	\$139.10 outside Collaborative Region	\$155.79 Nonmember	\$16.69 per route
Single district route: Wheel Chair vehicle	\$227.25 within Collaborative Region	\$254.52 Nonmember	\$27.27 per route
Single district route: Wheel Chair vehicle	\$231.80 outside Collaborative Region	\$259.61 Nonmember	\$27.81 per route

Cooperative Purchasing

PURPOSE

AVC improves efficiencies and increases cost savings through the facilitation of joint purchasing through which districts are able to obtain competitive pricing from vendors while taking advantage of a streamlined bid process – which often yield bids lower than the state bid list and single-district procurement activities. In 2014-2015, AVC conducted joint procurement of School Supplies, Paper, Office Supplies, Technology Services and Bread and Rolls for Food Service. The contracts with WB Mason for school supplies, paper and office supplies yielded a savings to districts of over \$215,000.

*Savings calculated based on items from the AVC WB Mason Office Supplies Contract and applying contracted discount compared with state pricing with WB Mason Catalog. Differences in prices between those items yielded an average of an additional 29% savings using the AVC Contract.

AVC Administrative Office
57 Orchard Street, Marlborough, MA

FY15 Estimated Savings resulting from Cooperative Purchase of Paper/Case, School & Office Supplies

Account Name	Office Supplies	Paper/Case	School Supplies	Total
Algonquin Regional HS	\$5,809.41	\$2,006.11	\$5,083.23	\$12,898.75
Assabet Valley Regional Voc	\$6,048.07	\$4,061.20	\$5,292.06	\$15,401.32
Assabet Valley Collaborative	\$2,325.36	\$1,128.14	\$2,034.69	\$5,488.18
Berlin-Boylston Regional	\$2,845.47	\$4,268.65	\$2,489.29	\$9,603.40
Hudson Public Schools	\$2,886.99	\$11,467.62	\$2,526.12	\$16,880.72
Marlborough Public Schools	\$12,823.01	\$17,963.83	\$11,220.13	\$42,006.97
Maynard Public Schools	\$2,082.25	\$3,240.00	\$1,821.97	\$7,144.22
Nashoba Regional	\$5,979.01	\$12,830.51	\$5,231.63	\$24,041.15
Northborough Public Schools	\$6,894.62	\$6,961.20	\$6032.80	\$19,888.62
Shrewsbury Public Schools	\$8,604.81	\$18,345.99	\$7,529.21	\$34,480.02
Southborough Public Schools	\$5,180.94	\$3,483.26	\$4,533.32	\$13,197.52
Westborough Public Schools	\$1,563.75	\$11,420.43	\$1,368.28	\$14,352.46
Total	\$63,043.68	\$97,176.94	\$55,162.72	\$215,383.33

Office Supplies Savings*

Account Name	Office Supplies (77% discount from ultimate office catalog pricing)	Office supplies (64% minimum discount from WB catalog)	Estimated Cost Savings
Algonquin Regional HS	\$20,332.92	\$26,142.33	\$5,809.41
Assabet Valley Regional Voc	\$21,168.23	\$27,216.30	\$6,048.07
Assabet Valley Collaborative	\$8,138.75	\$10,464.11	\$2,325.36
Berlin-Boylston Regional	\$9,959.14	\$12,804.61	\$2,845.47
Hudson Public Schools	\$10,104.46	\$12,991.45	\$2,886.99
Marlborough Public Schools	\$44,880.52	\$57,703.53	\$12,823.01
Maynard Public Schools	\$7,287.88	\$9,370.13	\$2,082.25
Nashoba Regional	\$20,926.53	\$26,905.54	\$5,979.01
Northborough Public Schools	\$24,131.18	\$31,025.80	\$6,894.62
Shrewsbury Public Schools	\$30,116.85	\$38,721.66	\$8,604.81
Southborough Public Schools	\$18,133.29	\$23,314.23	\$5,180.94
Westborough Public Schools	\$5,473.12	\$7,036.87	\$1,563.75
Total	\$220,652.87	\$283,696.55	\$63,043.68

Cooperative Purchasing

Paper Savings*				
Account Name	Paper-WB Mason	Paper/ Case	State bid \$	Estimated Cost Savings (=savings)
Algonquin RHS	\$8,391.55	251	\$6,385.44	\$2,006.11
Assabet Valley Regional Voc	\$17,290.00	520	\$13,228.80	\$4,061.20
Assabet Valley Collaborative	\$3,519.50	94	\$2,391.36	\$1,128.14
Berlin-Boylston Regional	\$17,370.25	515	13,101.60	\$4,268.65
Hudson Public Schools	\$48,915.30	1,472	\$37,447.68	\$11,467.62
Marlborough Public Schools	\$75,661.75	2,268	\$57,697.92	\$17,963.83
Maynard Public Schools	\$13,473.50	400	\$10,233.50	\$3,240.00
Nashoba Regional	\$53,051.15	1,581	\$40,220.64	\$12,830.51
Northborough Public Schools	\$29,094.00	870	\$22,132.80	\$6,961.20
Shrewsbury Public Schools	\$75,814.95	2,259	\$57,468.96	\$18,345.99
Southborough Public Schools	\$13,811.90	406	\$10,328.64	\$3,483.26
Westborough Public Schools	\$47,953.50	1,433	\$36,533.07	\$11,420.43
Total	\$388,076.07	12,069	\$465,634.20	\$97,176.94

*Savings calculated by comparing the price of a case of paper purchased through jointly procured contract with WB Mason with the price of paper available for purchase from the State Bid List. (Savings) = number of cases multiplied by the difference between prices. Percentage savings is approximately 32%.

School Supplies Savings*			
Account Name	School Supplies-WB	State bid (School Specialty) \$	Estimated Cost Savings
Algonquin Regional HS	\$20,332.92	\$25,416.15	\$5,083.23
Assabet Valley Regional Voc	\$21,168.23	\$26,460.29	\$5,292.06
Assabet Valley Collaborative	\$8,138.75	\$10,173.44	\$2,034.69
Berlin-Boylston Regional	\$9,957.14	\$12,446.43	\$2,489.29
Hudson Public Schools	\$10,104.46	\$12,630.58	\$2,526.12
Marlborough Public Schools	\$44,880.52	\$56,100.65	\$11,220.13
Maynard Public Schools	\$7,287.88	\$9,109.85	\$1,821.97
Nashoba Reg. School District	\$20,926.53	\$26,158.16	\$5,231.63
Northborough Public Schools	\$24,131.18	\$30,163.98	\$6,032.80
Shrewsbury Public Schools	\$30,116.85	\$37,646.06	\$7,529.21
Southborough Public Schools	\$18,133.29	\$22,666.61	\$4,533.32
Westborough Public Schools	\$5,473.12	\$6,841.40	\$1,368.28
Total	\$220,650.87	\$275,813.59	\$55,162.72

*Savings calculated by selecting 5-10 items from the AVC Contract WB Mason School Supplies Catalog and comparing those items from School Specialty School Supplies Catalog from the State Bid List. Differences in prices between those items yielded an additional 25% savings using the AVC Contract.

SELF TITLED LIFE



Expressive Arts programming supported through
Massachusetts Cultural Council "Self Titled Life" mural



Assabet Valley Collaborative

Administrative Office

57 Orchard Street • Marlborough, MA 01752

(508) 481-3611 • www.avcollaborative.org

Providing effective and efficient services to meet current
and evolving needs of member school districts:

Assabet Valley Region • Berlin/Boylston Region • Berlin • Boylston
Grafton • Hudson • Marlborough • Maynard • Millbury
Nashoba Region • Northborough • Northborough/Southborough Region
Southborough • Shrewsbury • Westborough

ASSABET VALLEY COLLABORATIVE
BASIC FINANCIAL STATEMENTS
AND
MANAGEMENT'S DISCUSSION AND ANALYSIS
TOGETHER WITH INDEPENDENT AUDITORS' REPORT
FOR THE YEAR ENDED JUNE 30, 2015

ASSABET VALLEY COLLABORATIVE

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JUNE 30, 2015

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Business Advisors
Certified Public Accountants

Independent Auditors' Report

To the Board of Directors
Assabet Valley Collaborative

Report on the Financial Statements

We have audited the accompanying financial statements of the governmental activities, and each major fund, of Assabet Valley Collaborative (the Collaborative), as of and for the year ended June 30, 2015, and the related notes to the financial statements, which collectively comprise the Collaborative's basic financial statements as listed in the table of contents.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes 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.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. 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. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinions

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities of Assabet Valley Collaborative as of June 30, 2015, and the respective changes in financial position, and the respective budgetary comparison for the general fund, for the year then ended in conformity with accounting principles generally accepted in the United States of America.

Other Matters

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis on pages 3– 6 and the budgetary comparison information on page 26 be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Other Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the Assabet Valley Collaborative basic financial statements. The supplementary information on pages 30-33 is presented for the purpose of additional analysis and is not a required part of the financial statements.

Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated December 2, 2015, on our consideration of Assabet 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 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 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 Assabet Valley Collaborative's internal control over financial reporting and compliance.

Franklin, Massachusetts
December 2, 2015

Parsons, Ratcliffe, Rugg & Co. P.C.

ASSABET VALLEY COLLABORATIVE
MANAGEMENT'S DISCUSSION & ANALYSIS
YEAR ENDED JUNE 30, 2015

The following discussion and analysis of the Assabet Valley Collaborative's (the Collaborative) financial performance provides an overview of the Collaborative's financial activities for the fiscal year ended June 30, 2015 and summarized comparative information for 2014. Please read it in conjunction with the Collaborative's financial statements, which follow.

THE COLLABORATIVE AS A WHOLE

The Collaborative was established for the purpose of conducting educational programs and/or services, which meet low-incidence special needs of children for whom its member school committees are responsible. The Collaborative also provides clinical services as requested by its member districts. Non-member school districts may contract for program and clinical services as capacity allows. The Collaborative is supported through program tuitions and fees for clinical services from contracting municipalities. The Collaborative is governed by an eleven member Board of Directors consisting of one representative from each district/region.

The Collaborative served 61 students equating to 42.85 full time equivalent students in its tuition based alternative middle and high school program (AVCAS) and 10.9 full time equivalent students in its intensive special needs REACH program. The post graduate program for 18-22 year old students with intensive special needs, Crossroads, was integrated with the Evolution program in FY13 (Tier3). During FY15, there was 1 REACH 3/4 student who transitioned to Evolution, located at Shrewsbury High School. These figures represent an increase of 2.3 student fte's in the Alternative program and 1.8 fewer student fte's in the intensive special needs programs. The Collaborative is in its fifth year of programming for the Evolution and Soar programs and served 30.2 (20.6-Tier 1&2, 9.6-Tier 3) and 21.1 full time equivalent students respectively. Evolution student fte's decreased by 1.9 FTE (Tiers 1-3), while the SOAR program had an increase of 3.2 student fte's or 18%. In addition, the Collaborative provided transportation for approximately 378 special needs students to and from public day, private day and residential placements. FY15 was the third year of a three year transportation contract with a new service provider; Van Pool. Therapeutic services were provided to over 150 students within member districts in the following disciplines: occupational, physical, speech, vision, and music therapies. AVC also added transition and child psychiatry consultation services in FY15. The Family Success Partnership was in its fourth year of providing wrap-around mental health services to 126 families (up from 97 in FY14) in collaboration with member districts. Services were funded by districts purchasing FTE allocations of staff to support students and families.

The Collaborative has a general fund balance of \$2,886,161.

OVERVIEW OF THE FINANCIAL REPORTS

This discussion and analysis is intended to serve as an introduction to the Collaborative's financial reports, which consist of a series of financial statements and other information as follows:

- ***Management's Discussion and Analysis*** introduces the basis financial statements and provides and analytical overview of the Collaborative's financial activities.
- ***Government-wide financial statements*** consist of the Statement of Net Position and the Statement of Activities. These provide both short-term and long-term information about the Collaborative's overall financial status.

ASSABET VALLEY COLLABORATIVE

MANAGEMENT'S DISCUSSION & ANALYSIS

YEAR ENDED JUNE 30, 2015

OVERVIEW OF THE FINANCIAL REPORTS (Continued)

- **Fund basis financial statements** focus on individual parts of the Collaborative, reporting the Collaborative's operations in more detail than the government-wide statements.
 - **Governmental funds statements** tell how basic services were financed in the short-term as well as what remains for future spending.
- **Notes to the financial statements** explain some of the information in the statements and provide more detailed data.
- **Supplementary information** includes both additional financial information which provides more detail support of the basis financial statements and information required by the Massachusetts Department of Elementary and Secondary Education.

Government-wide Statements

The government-wide statements (*statement of net position* and *statement of activities*) 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 fund.

- **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.

ASSABET VALLEY COLLABORATIVE

MANAGEMENT'S DISCUSSION & ANALYSIS

YEAR ENDED JUNE 30, 2015

GOVERNMENT-WIDE FINANCIAL ANALYSIS

The following summarized *Statement of Net Position* is for the fiscal year 2015 with comparative information from fiscal year 2014 .

	June 30, 2015	June 30, 2014
Current assets, i.e. cash, accounts receivable and prepaid expenses (restated in 2014)	\$4,486,000	\$4,337,000
Capital assets	<u>326,000</u>	<u>320,000</u>
Total assets	<u>\$4,812,000</u>	<u>\$4,657,000</u>
Current liabilities, i.e. accounts payable, accrued expenses , current portion of long-term debt and unearned revenue	\$1,629,000	\$1,544,000
Non-current liabilities	<u>1,653,000</u>	<u>1,189,000</u>
Total liabilities	<u>\$3,282,000</u>	<u>\$ 2,733,000</u>
Net position:		
Invested in capital assets	\$ 255,000	\$ 320,000
Unrestricted	<u>1,275,000</u>	<u>1,604,000</u>
Total net position (restated in 2014)	<u>\$1,530,000</u>	<u>\$1,924,000</u>

ASSABET VALLEY COLLABORATIVE

MANAGEMENT'S DISCUSSION & ANALYSIS

YEAR ENDED JUNE 30, 2015

As indicated in the following summarized *Statement of Activities*, net assets decreased by \$394,000 during fiscal year 2015. Average enrollments increased by from the prior year. Expenses increased to accommodate the increases in enrollments.

	Year ended June 30, 2015	Year ended June 30, 2014	% Change
Revenues:			
Assessments to member towns	\$ 58,000	\$ 58,000	
Charges for services (restated in 2014)	11,049,000	10,032,000	
Intergovernmental revenue	546,000	34,000	
Grants and contributions	322,000	271,000	
Interest income	12,000	16,000	
Other	<u>19,000</u>	<u>2,000</u>	
Total Revenues	<u>12,006,000</u>	<u>10,413,000</u>	+15.3%
Expenses:			
Administration	874,000	1,237,000	
Education	10,917,000	9,482,000	
Intergovernmental expense	546,000	34,000	
Depreciation - unallocated	<u>63,000</u>	<u>60,000</u>	
Total Expenses	<u>12,400,000</u>	<u>10,813,000</u>	+14.7%
Change in net position	(394,000)	(400,000)	
Net position – beginning of year	<u>1,924,000</u>	<u>2,324,000</u>	
Net position – end of year (restated in 2014)	<u>\$1,530,000</u>	<u>\$1,924,000</u>	

GENERAL FUND BUDGETARY HIGHLIGHTS

The budget for fiscal year 2015 provided for a deficit of \$284,000, to be covered by prior year general funds. In 2015, actual revenues were higher than anticipated by approximately \$110,000 due to an increase in transportation services provided.

Total expenditures were lower than budgeted amounts by approximately \$92,000.

REQUESTS FOR INFORMATION

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

ASSABET VALLEY COLLABORATIVE

STATEMENT OF NET POSITION

JUNE 30, 2015

	Governmental Activities
CURRENT ASSETS:	
Cash	\$ 2,883,234
Accounts receivable	1,602,210
Total current assets	<u>4,485,444</u>
PROPERTY, PLANT AND EQUIPMENT:	
Capital assets	592,639
Accumulated depreciation	266,521
Net capital assets	<u>326,118</u>
TOTAL ASSETS	<u>4,811,562</u>
CURRENT LIABILITIES:	
Accounts payable and accrued expenses	1,080,280
Current portion of long-term debt	29,628
Unearned revenue	519,003
Total current liabilities	<u>1,628,911</u>
NON-CURRENT LIABILITIES:	
Long-term debt	41,076
Other post employment benefits	<u>1,611,542</u>
TOTAL LIABILITIES	<u>3,281,529</u>
NET POSITION:	
Invested in capital assets	255,414
Unrestricted	1,274,619
Total net position	<u>\$ 1,530,033</u>

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

ASSABET VALLEY COLLABORATIVE

STATEMENT OF ACTIVITIES

FOR THE YEAR ENDED JUNE 30, 2015

Functions/ Programs	Charges for Expenses	Program Revenues		Net (Expense) Revenue and Changes in Net Position
		Charges for Services	Operating Grants and Contributions	Total
Governmental Activities:				
Administration	\$ 873,786	\$ -	\$ -	\$ 873,786
Education	10,917,235	11,048,099	322,287	(453,151)
Intergovernmental revenue and expense	545,502	545,502	-	-
Depreciation - unallocated	62,780	-	-	62,780
Total Governmental Activities	<u>\$ 12,399,303</u>	<u>\$ 11,593,601</u>	<u>\$ 322,287</u>	483,415
General revenue:				
Assessments to member districts				57,750
Interest				11,783
Other				18,933
Total General Revenue				<u>88,466</u>
Change in Net Position				(394,949)
NET POSITION, BEGINNING OF YEAR				1,723,741
PLUS RESTATEMENT PER NOTE 11				<u>201,241</u>
NET POSITION, END OF YEAR				<u>\$ 1,530,033</u>

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

ASSABET VALLEY COLLABORATIVE

BALANCE SHEET – GOVERNMENTAL FUNDS

JUNE 30, 2015

ASSETS:

Cash	\$ 2,883,234
Accounts receivable	1,602,210
Total assets	<u>\$ 4,485,444</u>

LIABILITIES:

Accounts payable and accrued expenses	1,080,280
Unearned revenue	<u>519,003</u>
Total liabilities	1,599,283

FUND BALANCES:

Cumulative surplus (Unassigned)	<u>2,886,161</u>
Total fund balances	2,886,161
Total liabilities and fund balances	<u>\$ 4,485,444</u>

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

ASSABET VALLEY COLLABORATIVE

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

FOR THE YEAR ENDED JUNE 30, 2015

	General Fund
REVENUES:	
Member assessments	\$ 57,750
Program revenues	11,341,925
Federal and State grants	28,461
Intergovernmental revenue	545,502
Interest	11,783
Other revenue	18,933
Total revenues	<u>12,004,354</u>
EXPENDITURES:	
Administration	821,827
Professional development	63,249
Multiple handicapped (REACH/Crossroads)	893,434
OT/PT/Therapies/Contract services	429,996
Transportation	4,875,439
Alternative programs (AVCAS)	2,315,573
Vocational program (Evolution)	1,606,120
PD Revolving MOEC	2,041
Evolution Events Club SA	773
AVCAS-Mass Cultural Cncl Grant	3,551
Sudbury Fdtn Grant-FSP Cost Avoidance	22,750
DDM Developmt Ldrship Grant	23,378
Building Use Renovating	2,922
Family success partnership (FSP)	228,386
REACH gift	991
CF Adams Trust	53,231
Essential School Health	3,000
Intergovernmental expense	545,502
Capital outlay, net of debt incurred	-
Debt Services:	
Debt principal	18,268
Debt interest	1,226
Total expenditures	<u>11,911,657</u>
Revenue over (under) expenditures	92,697
FUND BALANCES, BEGINNING OF YEAR	2,592,223
PLUS RESTATEMENT PER NOTE 11	201,241
FUND BALANCES, END OF YEAR	<u>\$ 2,886,161</u>

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

ASSABET VALLEY COLLABORATIVE

RECONCILIATION OF THE BALANCE SHEET - GOVERNMENTAL FUNDS TO THE STATEMENT OF NET POSITION

JUNE 30, 2015

Total fund balance, governmental funds	\$ 2,886,161
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Amounts reported for governmental activities in the Statement of Net Position are different because:

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	255,414
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The 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.	<u>(1,611,542)</u>
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Net Position of Governmental Activities in the Statement of Net Position	<u>\$ 1,530,033</u>
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The accompanying notes are an integral part of these financial statements.

ASSABET VALLEY COLLABORATIVE

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

FOR THE YEAR ENDED JUNE 30, 2015

Net changes in balances -governmental funds	\$ 92,697
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Amounts reported for governmental activities in the Statement of Activities are different because:

Governmental funds report outlays for capital 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 expense for the period. This is the amount by which depreciation exceeded capital outlays and related debt payments in the current period.

(54,656)

Some expenses reported in the Statement of Activities do not require the use of current financial resources and, therefore, are not reported as expenditures in the governmental funds.

Net change in other postemployment benefits (OPEB) accrual	<u>(432,990)</u>
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Changes in net position of governmental activities	<u><u>\$(394,949)</u></u>
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The accompanying notes are an integral part of these financial statements.

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(1) NATURE OF ORGANIZATION AND REPORTING ENTITY

(a) Organization

The Assabet Valley Collaborative (the Collaborative) was established and operates under the provisions of Massachusetts general laws Chapter 40, Section 4E as amended by Chapter 797 of the acts of 1974. The Collaborative includes the school districts of the City of Marlborough and towns of Berlin, Bolton, Boylston, Hudson, Maynard, Northborough, Southborough, Westborough, Stow and Shrewsbury, Massachusetts and Algonquin Regional High School, Nashoba Regional High School, Tahanto Regional High School and Assabet Valley Regional Vocational High School, which are separated legal entities with their own governing bodies. Their operations are not part of the Collaborative's financial statements.

Assessments: According to the Collaborative Agreement, each member community is annually assessed a membership fee which is determined annually by the Board of Directors. The FY 15 membership fee was \$5,250 per district. FY 15 Revenue for assessments was \$57,750 for fiscal year 2015 as approved by the Board of Directors.

The Collaborative provides services to special education students in grades 6 through 12 whose Individual Education Plan (IEP) Teams have identified a need for separate therapeutic settings. The Collaborative also provides vocational transition support into the community for post high school up to age 22. These services are provided to member communities on a tuition basis to cover direct operation expenditures. Non-member districts may access programs and services as capacity allows at the non-member rate.

(b) Reporting Entity

As required by accounting principles generally accepted in the United States of America (GAAP) and in accordance with the Governmental Accounting Standards Board, the accompanying financial statements present the Assabet Valley Education Collaborative and its component units. Component units are included in the reporting entity if their operational and financial relationships with the Collaborative are significant. Pursuant to these criteria, the Collaborative did not identify any component units requiring inclusion in the accompanying financial statements.

(2) SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

(a) Basis of Presentation

Government-wide Financial Statements

The statement of net position and statement of activities display information about the reporting government as a whole. They include all funds of the reporting entity except for fiduciary funds. The statements distinguish between governmental and business-type activities. Governmental activities generally are financed through assessments to member towns, intergovernmental revenues and other non-exchange revenues. The Collaborative did not have any business type activity in 2015.

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(2) SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

(a) Basis of Presentation (Continued)

The statement of activities demonstrates the degree to which the direct expenses of a given function or segment are offset by program revenues. Direct expenses are those that are clearly identifiable with a specific function or segment. The Collaborative does not allocate indirect expenses to functions in the statement of Activities. Program revenues included (1) charges to customers or applicants who purchase, use or directly benefit from goods, services or privileges provided by a given function or segment and (2) grants and contributions that are restricted to meeting the operational or capital requirements of a particular function or segment. Assessments and other items not properly included among program revenues are reported instead as general revenues.

Fund Financial Statements

Fund financial statements of the reporting entity are organized into funds each of which are considered to be separate accounting entities. Each fund is accounted for by providing a separate set of self-balancing accounts, which constitute its assets, liabilities, fund balance, revenues and expenditures.

Government Activities

Government funds are identified as either general, or fiduciary funds based upon the following guidelines:

The General Fund is the general operating fund of the Collaborative and is always classified as a major fund. It is used to account for all financial resources except those required to be accounted for in another fund.

Fiduciary funds are used to account for resources legally held in trust. All resources of the fund, including any earnings on invested resources, must be used to support the payment of Other Post-Employment Benefits (OPEB) expenditures. The Collaborative has no Fiduciary Funds.

(b) Basis of Accounting

The Collaborative's Statement of Net Position and Statement of Activities are presented using the economic resources measurement focus and the accrual basis of accounting. Under the accrual basis of accounting, revenues are recognized when earned and expenses are recorded when the liability is incurred or economic asset used. Revenues, expenses, gain, losses, assets, and liabilities resulting from exchange and exchange-like transactions are recognized when the exchange takes place. The modified accrual basis of accounting is followed by the governmental funds, proprietary funds and agency funds. Under the modified accrual basis of accounting, revenues are recorded when susceptible to

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(2) SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

(b) Basis of Accounting (Continued)

accrual, i.e., both measurable and available. Available means collectible within the current period or soon enough thereafter to be used to pay liabilities of the current period. Expenditures are recorded when the related fund liability is incurred, except for unmatured interest on long-term debt, judgments, compensated absences and pension expenditures, which are recorded as a fund liability when expected to be paid with expendable available financial resources.

State general aid and other entitlements are recognized as revenue in the period the Collaborative is entitled to the resources and the amounts are available. Expenditure-driven programs currently reimbursable are recognized as revenue when the qualifying expenditures have been incurred and the amounts are available. Amounts owed to the Collaborative, which are not available are recorded as receivables and unearned revenue. Amounts received prior to the entitlement period are also recorded as unearned revenue.

Revenues susceptible to accrual include state aid, expenditure-driven programs and interest income.

Charges for services provided to other education agencies and private parties are recognized as revenue when services are provided.

(c) Measurement Focus

On the Statement of Net Position and Statement of Activities governmental activities and business-type activities are presented using the economic resources measurement focus. Under this concept, revenues and expenses are matched using the accrual basis of accounting.

The measurement focus of all governmental funds is the flow of current financial resources concept. Under this concept, sources and uses of financial resources, including capital outlays debt proceeds and debt retirements, are reflected in operations. Resources not available to finance expenditures and commitments of the current period are recognized as unearned revenue or a reservation of fund equity. Liabilities for claims, judgments, compensated absences and pension contributions, which will not be currently liquidated, using expendable available financial resources, are included as liabilities in the Collaborative's government wide financial statements but are excluded from the governmental fund financial statements. The related expenditures are recognized in the governmental fund financial statements when the liabilities are liquidated.

(d) Accounts Receivable

Represents amounts due from Collaborative members and communities participating in the various programs offered by the Collaborative. There is no allowance for doubtful accounts as all receivables were considered collectible at June 30, 2015.

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(2) SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

(e) Capital Assets

Government-wide Statements

In the Collaborative's financial statements, capital assets (with an asset cost greater than \$5,000) are accounted for as capital assets. All capital assets are valued at historical cost or estimated historical cost if actual is unavailable, except for donated capital assets, which are recorded at their estimated fair value at the date of donation.

Depreciation of all exhaustible assets is recorded as an expense in the Statement of Activities, with accumulated depreciation reflected in the Statement of Net Position. Depreciation is provided over the assets' estimated useful lives using the straight-line method of depreciation. The range of estimated useful lives by type of asset is as follows:

Leasehold improvements	10 years
Furniture and equipment	5 – 15 years

Fund Financial Statements

In the fund financial statements, capital assets used in governmental fund operations are accounted for as capital outlay expenditures of the governmental fund upon acquisition. Capital assets are not capitalized and related depreciation is not reported in the financial statements.

(f) Budgets

Budgetary information is derived from the annual operating budget and is presented using the same basis of accounting as the General Fund.

(g) Compensated Absences and Other Employee Benefit amounts

The Collaborative's policies allow employees to earn varying amounts of vacation pay each depending on the number of years employed and the particular contract of the employee. Vacation pay is granted on July 1 of each fiscal year and only a limited number of employees may carry over a limited amount from the preceding fiscal year. Upon separation of employment, the employee is entitled to the pro-rated amount of vacation pay outstanding at that time. The vacation liability carryover at June 30, 2015 totaled \$ 20,849.

(h) Claims and Judgments

Claims and judgments are recorded as liabilities if all the conditions of Governmental Accounting Standards Board pronouncements are met. Claims and judgments that would normally be liquidated with expendable available financial resources are recorded during the year as expenditures in the governmental funds. If they are not to be liquidated with expendable available financial resources, no liability is recognized in the

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(2) SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

(h) Claims and Judgments (Continued)

governmental fund statements. The related expenditure is recognized when the liability is liquidated. Claims and judgments are recorded in the Collaborative's financial statements as expense when the related liabilities are incurred. There were no claims or judgments at year-end that require reporting in the financial statements.

(i) Equity Classifications

Government-wide Statements

Equity is classified as net position and displayed in three components:

Net investment in capital assets - Consists of capital assets including restricted capital assets net of accumulated depreciation and reduced by the outstanding balances of any bonds, mortgages, notes or other borrowings that are attributed to the acquisition construction or improvement of those assets. If there are significant unspent related debt proceeds at year-end the portion of the debt attributable to the unspent proceeds are not included in the calculation of invested in capital assets. The Collaborative has no bonded debt on Capital assets at June 30, 2015.

Restricted net position- Consists of net position with 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 net position – All other net position that do not meet the definition of "restricted" or "invested in capital assets, net of related debt."

Governmental Fund Statements

Governmental Fund Equity is classified as Fund Balance. Fund Balance in the Fund Financial Statements is classified as nonspendable, restricted, committed, assigned or unassigned as described below:

Nonspendable: Fund balances that cannot be spent because they are either:

Not in Spendable Form: Generally, amounts that are not expected to be converted to cash, such as inventories or prepaid amounts. This classification would also include some long-term portion of loans receivable.

Legally or Contractually required to be maintained intact. Amounts that are required to be maintained intact, such as the principal of a permanent fund.

Restricted: Amounts that can be used only for specific purposes because of (a) constitutional provisions or enabling legislation or (b) externally imposed constraints. (External constraints might be imposed by creditors, grantors, contributors, or even the laws or regulations of other governments.)

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(2) SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

(i) Equity Classifications (Continued)

Committed: Amounts that can be used only for specific purposes because of a formal action by the government's highest level of decision-making authority (Board of Directors). This classification might also include contractual obligations if existing resources have been committed for use in satisfying those contractual requirements.

Assigned: Amounts intended to be used for specific purposes but that do not meet the criteria to be classified as restricted or committed. Intent can be stipulated by the governing body, another body (such as a finance committee), or by an official to whom that authority has been given.

Unassigned: This is residual classification for the General Fund – that is, everything that is not in another classification or in another fund. The General Fund is the only governmental fund that can report a positive unassigned fund balance. Other governmental funds might have a negative unassigned fund balance as a result of overspending for specific purposes for which amounts have been restricted, committed, or assigned.

The Collaborative's spending policy is to spend restricted fund balance first, followed by committed, assigned and unassigned fund balance.

(j) Allocation of Costs

Directly identifiable costs are charged to student services or general and administrative functions as applicable. Costs related to more than one function are allocated based on criteria intended to associate the cost with whichever function benefits.

(k) Use of Estimates

Management uses estimates and assumptions in preparing financial statements. These estimates and assumptions affect the reported amounts of assets and liabilities, the disclosure of contingent liabilities, and the reported revenues and expenses. Accordingly, actual results may differ from those estimates.

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(3) CASH

Cash and investments of Collaborative funds is restricted by state statutes. Massachusetts General Law authorizes the Collaborative to invest in term deposits, Certificates of Deposit, in trust companies, national banks, savings banks or in obligations issued by the U.S. Government or one of its agencies.

Credit Risk

The carrying amount of the Collaborative's deposits is separately displayed on the balance sheet as cash.

	<u>June 30, 2015</u>	
	Carrying Amount	Bank Balance
Insured (FDIC) and (DIF)	<u>\$2,883,234</u>	<u>\$3,478,261</u>
Total Cash	<u>\$2,883,234</u>	<u>\$3,478,261</u>

Deposits are insured by the Federal Deposit Insurance Corporation up to \$250,000 and deposits, including Certificates of Deposits in Massachusetts-chartered savings banks are insured in full above the FDIC limit from the Depositors Insurance Fund (DIF) of Massachusetts.

Cash is reported in the financial statements as follows:

Governmental Activities	\$2,883,234
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(4) CAPITAL ASSETS

Capital asset activity for the year ended June 30, 2015 was as follows:

	Balance 6/30/14	Additions	Balance 6/30/15
Capital assets being depreciated:			
Leasehold Improvements	\$448,247	\$ -	\$448,247
Furniture and equipment	41,867	-	41,867
Vehicles	<u>34,024</u>	<u>68,501</u>	<u>102,525</u>
Total Capital Assets Being Depreciated	<u>524,138</u>	<u>68,501</u>	<u>592,639</u>
Less: Accumulated depreciation for:			
Leasehold improvements	148,064	41,100	189,164
Furniture and equipment	42,067	1,175	43,242
Vehicle	<u>13,610</u>	<u>20,505</u>	<u>34,115</u>
Total Accumulated Depreciation	<u>203,741</u>	<u>62,780</u>	<u>266,521</u>
Net Capital Assets	<u>\$320,397</u>	<u>\$ 5,721</u>	<u>\$326,118</u>

Depreciation expense was not charged to various functions but was shown as a separate line item as unallocated in the statement of activities.

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(5) CUMULATIVE SURPLUS

In accordance with Massachusetts regulation 603 C.M.R. 50.07, the Collaborative has determined that its Cumulative Surplus as of June 30, 2015 is equal to the Unassigned General Fund Balance of \$2,886,161. The Collaborative Agreement stipulates that the Board will retain no more than 25 percent of the previous year's (i.e. audited year's) general fund expenditures, which is equal to \$2,977,914, in cumulative surplus.

(6) RETIREMENT BENEFIT PLANS

The majority of employees of the Collaborative are covered by either the Massachusetts State Employees' Retirement System (MSERS), or the Massachusetts Teachers' Retirement System (MTRS) depending on their employment position.

The Massachusetts State Employees' Retirement System (MSERS) is a public employee retirement system (PERS), that administers a cost-sharing multi-employer defined benefit plan as defined by Governmental Accounting Standards Board (GASB) Statement No. 67, *Financial Reporting for Pension Plans*, covering substantially all employees of the Commonwealth and certain employees of the independent authorities and agencies. The Collaborative's contribution rate was 5.6% of MSERS wages as of June 30, 2015 and totaled \$30,476 for the fiscal year then ended. This contribution is calculated per MGL 32, & 28(4)(c) as a reimbursement to the Massachusetts State Retirement Board (the Board) for its share of any retirement allowance or pension amounts paid by the Board during the preceding calendar year which were based on service to the Collaborative as determined by the plan actuary. Legally, the Collaborative is responsible for contributing the annual normal cost of its employees' benefits (i.e., the present value of the benefits earned by those employees in any given year) and is not legally responsible for the past service cost attributable to those employees or previously retired employees of the Collaborative. The Commonwealth as a nonemployer contributor is legally responsible for the entire past service cost related to the collaboratives and therefore has a 100% special funding situation as defined by GASB Statement No. 68, *Accounting and Financial Reporting for Pensions*. As such the Commonwealth contributes to the Massachusetts State Employees' Retirement System on behalf of the Collaborative. In accordance with government accounting standards, the Collaborative is required to record such "on behalf payments" as revenue and expenditures in the financial statements. Contributions made by the Commonwealth "on behalf" of the Collaborative totaled \$73,498. This amount is included in the accompanying statement of activities as intergovernmental revenue and expense.

The following information was attributed to the Collaborative from allocation schedules prepared by The Commonwealth of Massachusetts State Retirement Board and audited by KPMG,LLP:

Net pension liability 6/30/14	\$1,871,525
Proportionate share of plan pension expense	\$138,553
Net amortization of deferred amounts from change in proportion	\$(5,468)
Total employer pension expense	\$133,085

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(6) RETIREMENT BENEFIT PLANS (Continued)

The Commonwealth of Massachusetts contributes to the Massachusetts Teachers Retirement System (MTRS) on behalf of the Collaborative. The Commonwealth is a nonemployer contributor and is required by statute to make all actuarially determined employer contributions on behalf of the member employers. 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 MTRS. In accordance with government accounting standards, the Collaborative is required to record such "on behalf payments" as revenue and expenditures in the financial statements. Pension support provided to the Collaborative totaled \$472,004. This amount is included in the accompanying statement of activities as intergovernmental revenue and expense.

The following information was attributed to the Collaborative from allocation schedules prepared by The Commonwealth of Massachusetts Teachers' Retirement Board and audited by KPMG,LLP:

Proportionate share of the net pension liability at 6/30/14	\$6,793,883
Commonwealth pension support provided	\$400,623
Total employer pension expense and revenue for Commonwealth support	\$472,004

All employees working 50% or more of a standard workweek are covered by and must participate in one of the systems referred to above depending on their type of position. Under the plans, benefits vest after 10 years of full-time employment. An employee with 20 years of service, or 10 years of service and having attained age 55, may receive retirement benefits.

Based on state statute, covered employees of the Collaborative contribute an amount ranging from 5% to 11% (depending on date of employment) of their gross earnings to the systems. The Commonwealth is required to make actuarially determined contributions that maintain the financial integrity of the retirement system.

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(7) LEASE DISCLOSURES

The Collaborative rents classroom and office space from several of its member communities. The following summarizes rent by location:

Location	Rental Space	Annual Rent
Marlborough – Bigelow School	School Building	\$142,800
Shrewsbury – High School	Transition Space	\$ 37,183

Future minimum payments, by year, for the next five years and in the aggregate, under non cancellable real property operating leases consisted of the following at June 30, 2015:

Fiscal year-end	Amount
2016	\$ 183,942
2017	\$ 187,996
2018	\$ 192,139
2019	\$ 196,363
2020	\$ 182,457
2021 - 2038	<u>\$3,443,442</u>
Total	<u>\$4,386,339</u>

Rent expense for real property leases totaled \$179,983 for the fiscal year ended June 30, 2015.

In addition, the Collaborative leases copy and postage equipment. Future minimum lease payments under non cancellable operating equipment leases with initial or remaining terms of one year or more consisted of the following at June 30, 2015.

Fiscal year-end	Amount
2016	<u>\$20,561</u>
Total Minimum Lease Payments	<u>\$20,561</u>

Rent expense for operating leases for fiscal 2015 totaled \$43,417.

(8) OTHER POST-EMPLOYMENT BENEFITS PAYABLE

Plan Description

The Collaborative, per its contracts with employees, generally will pay 50 percent of health care benefits for retirees and their spouses. This agreement can be amended by action of the Collaborative subject to applicable policy changes and employment agreements. The Plan does not issue a stand-alone financial report since there are no assets legally segregated for the sole purpose of paying benefits under the plan.

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(8) OTHER POST-EMPLOYMENT BENEFITS PAYABLE – (Continued)

Funding Policy

The contribution requirements of the plan members and the Collaborative are established pursuant to applicable employment contracts.

Required contributions are based on projected pay-as-you-go financing. The cost of administering the plan is paid by the Collaborative. The Collaborative provided required contributions of \$9,898 toward the annual Other Post-Employment Benefit (OPEB) cost, comprised of benefit payments made on behalf of retirees (net of reinsurance), administrative expenses, and reinsurance payments, and net of retiree contributions.

Annual OPEB Cost and Net OPEB Obligation

The Collaborative's annual other post-employment benefit (OPEB) cost (expense) is calculated based on the annual required contribution of the employer (ARC). The Collaborative has engaged an actuary to calculate the ARC and related information. The ARC represents a level of funding that, if paid on an ongoing basis, is projected to cover normal cost each year and amortize any unfounded actuarial liabilities (or funding excess) over a period not to exceed thirty (30) years.

The following table shows the components of the Collaborative's annual OPEB costs for the fiscal year, the amount deemed to have been actually contributed to the plan and changes in the Collaborative's net OPEB obligation to the plan at June 30, 2015:

Annual OPEB Cost and NET OPEB Obligation

Fiscal Year Ending	6/30/15
Discount rate	4.0
Annual Required Contributions	\$ 460,840
Interest on Net OPEB Obligation	47,142
Adjustment to annual required contribution	<u>(42,303)</u>
Annual OPEB cost (expense)	465,679
Expected Employer contributions (including subsidy)	<u>32,689</u>
Change in Net Obligation	432,990
Net OPEB Obligation (Asset) – beginning of year	<u>1,178,552</u>
Net OPEB Obligation (Asset) – end of year	<u><u>\$1,611,542</u></u>

The Collaborative's annual OPEB cost, the percentage of annual OPEB cost contributed to the plan and the total net OPEB obligation as of June 30, 2015 was as follows:

Fiscal Year Ended	Annual OPEB Cost	Percentage of Annual OPEB Cost Contributed	Net OPEB Obligation
6/30/15	\$465,679	0%	\$1,611,542

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(8) OTHER POST-EMPLOYMENT BENEFITS PAYABLE – (Continued)

Funded Status and Funding Progress

As of July 1, 2011, the most recent valuation date, the actuarial accrued liability for benefits was \$2,524,683, and the actuarial value of plan assets was \$0, resulting in an unfunded actuarial liability of \$2,524,683.

The projection of future benefit payments for an ongoing plan involves estimates of the value of reported amounts and assumptions about the probability of occurrence of events far into the future. Examples include assumptions about future employment, mortality, and the healthcare cost trend. Amounts determined regarding the funded status of the plan and the annual required contribution of the employer are subject to continual revision as actual results are compared with past expectations and new estimates are made about the future.

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 evaluation and the historical pattern of sharing of benefit costs 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 long-term perspective of the calculations.

The Collaborative's OPEB actuarial valuation as of July 1, 2011 used the projected unit credit actuarial method to estimate both the unfunded actuarial liability as of June 30, 2011 and to estimate the Collaborative's Fiscal Year 2015 annual required contribution. The OPEB liability is currently unfunded and the actuarial assumptions include a 4.00 percent rate of return on invested assets. The actuarial assumptions also include an expected payroll growth of 4.50 percent, and an annual health care cost trend rate of 9 percent for medical and dental costs for Fiscal Year 2015. The medical cost rate is reduced to a final cost rate of 5 percent for both medical and dental costs in fiscal year 2016. The unfunded actuarial accrued liability is being amortized at 4 percent per year over 30 years at transition. The remaining amortization period at July 1, 2011 is 28 years.

ASSABET VALLEY COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

JUNE 30, 2015

(9) RISK MANAGEMENT

The Collaborative is exposed to various risks of loss related to torts: theft of, damage to, or destruction of assets; errors and omissions; workers compensation and health care of its employees. All of these risks are covered through the purchase of commercial insurance, with minimal deductibles. Settled claims have not exceeded insurance coverage. There were no significant changes in coverage compared to the prior year.

(10) COMMITMENTS AND CONTINGENCIES

From time to time, the Collaborative may be party to various pending claims and legal proceedings. Although the outcome of such matters cannot be forecast with certainty, it is the opinion of management and the Collaborative's legal counsel that the likelihood is remote that any such claims or proceedings will have a material adverse effect on the Collaborative's financial position or results of operations.

The Collaborative has received federal and state grants for specific purposes that are subject to review and audit by the grantor agencies. Such audits could lead to requests for reimbursements to the grantor agency for expenditures disallowed under terms of the grants. Management believes such disallowances, if any, would be immaterial.

The Collaborative has employment contracts with members of management. The contracts expire on various dates from June 30, 2017 to June 30, 2019.

(11) PRIOR PERIOD ADJUSTMENT

Accounts receivable were understated by \$201,241 as of June 30, 2014 due to errors made in recording entries in the general ledger. As a result, opening fund and net position beginning balances have been adjusted to correct this.

(12) SUBSEQUENT EVENTS

The Collaborative evaluated subsequent events through December 2, 2015, which is the date the financial statements were available to be issued.

ASSABET VALLEY COLLABORATIVE

REQUIRED SUPPLEMENTARY INFORMATION
JUNE 30, 2015

ASSABET VALLEY COLLABORATIVE

STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES OF THE GENERAL FUND - BUDGET AND ACTUAL - BUDGETARY BASIS

FOR THE YEAR ENDED JUNE 30, 2015

	Original Approved Budget	Final Approved Budget	Actual (Budgetary Basis)	Variance Favorable (Unfavorable)
Revenues:				
Member assessments	\$ 57,750	\$ 57,750	\$ 57,750	\$ -
Professional development	60,376	64,808	62,953	(1,855)
Multiple handicapped (REACH/Crossroads)	886,816	802,376	802,376	-
OT/PT/Therapies/Contract services	457,687	492,850	487,214	(5,636)
Transportation	5,142,500	5,606,827	5,607,009	182
Alternative programs (AVCAS)	2,470,404	2,513,615	2,638,548	124,933
Vocational program (Evolution)	1,634,012	1,577,308	1,467,930	(109,378)
Family success partnership (FSP)	197,500	232,666	232,666	-
Other programs	-	-	43,406	43,406
Grants/gifts	-	-	28,461	28,461
Bank interest	-	-	11,783	11,783
Other	-	-	18,756	18,756
Total Revenues	<u>10,907,045</u>	<u>11,348,200</u>	<u>11,458,852</u>	<u>110,652</u>
Expenditures:				
Administration	898,230	877,812	821,827	55,985
Professional development	51,675	63,719	63,249	470
Multiple handicapped (REACH/Crossroads)	951,887	898,882	893,434	5,448
OT/PT/Therapies/Contract services	443,187	480,689	429,996	50,693
Transportation	4,515,888	4,873,880	4,875,439	(1,559)
Alternative programs (AVCAS)	2,472,659	2,430,738	2,315,573	115,165
Vocational program (Evolution)	1,581,800	1,550,379	1,606,120	(55,741)
Family success partnership (FSP)	226,574	232,016	228,386	3,630
Other programs	-	-	112,637	(112,637)
Other	50,000	50,000	19,494	30,506
Total Expenditures	<u>11,191,900</u>	<u>11,458,115</u>	<u>11,366,155</u>	<u>91,960</u>
Excess (Deficiency) of Revenues Over (Under) Expenditures	(284,855)	(109,915)	92,697	202,612
Other Financing Sources				
Use of designated fund balance	524,211	109,915	-	-
Excess of Revenue and Other Financing Sources Over Expenditures	<u>\$ 239,356</u>	<u>\$ -</u>	<u>\$ 92,697</u>	<u>\$ 202,612</u>

ASSABET VALLEY COLLABORATIVE

SCHEDULE OF FUNDING PROGRESS OF OTHER POST-EMPLOYMENT BENEFITS

JUNE 30, 2015

Actual Valuation Date	Value of Assets (a)	Accrued Liability (b)	Unfunded AAL (UAAL) (b-a)	Funded Ratio (a/b)
7/1/2015	\$0	\$2,941,876	\$2,941,876	0.00%
7/1/2014	\$0	\$2,524,683	\$2,524,683	0.00%
7/1/2013	\$0	\$2,127,772	\$2,127,772	0.00%

ASSABET VALLEY COLLABORATIVE

SUPPLEMENTARY INFORMATION
JUNE 30, 2015

ASSABET VALLEY COLLABORATIVE
STATEMENT OF REVENUE AND EXPENDITURES AND
CHANGES IN FUND BALANCE BY PROGRAM
FOR THE YEAR ENDED JUNE 30, 2015

	Multi Handicapped REACH	Transportation	Professional Development	Student Exchange	Alternative HS	Consultation Services	Vocational Evolution	Family Success Partnership
Revenues								
Programs	802,376	5,607,009	62,953	-	2,452,118	487,214	1,654,360	232,666
Federal and state grants								
Other revenue								
Total Revenues	802,376	5,607,009	62,953	-	2,452,118	487,214	1,654,360	232,666
Expenditures								
Salaries	434,956	43,408	6,906		1,611,723		946,910	187,495
Therapy	141,085				27,346	348,513	140,963	
Other contracted services	1,309		36,816		72,336	3,212	3,398	2,418
Transportation		4,820,685			6,615		10,909	
Supplies	11,561				40,341	1,126	24,567	728
Retirement	12,348	2,431			14,226	5,574		
Medicare	8,225	529			21,969	4,176	13,342	2,134
Travel					98	2,685	6,113	5,397
Liability insurance						5,014	1,163	
Medical insurance	100,772	6,237			175,764	54,263	211,944	22,704
Medical services	142,725				102,760		132,909	
Teacher's retirement							23,964	
Rent					118,117		37,183	
Maintenance	284				42,801		239	
Membership & subscriptions		200					61	
Telephone & utilities	2,610	926			12,828	302	6,939	2,740
Equipment	35,255	1,023	149		68,848	50,082	39,910	2,340
Misc. services	831		19,378		31,800		2,673	2,430
Professional development	1,473				150		10,276	
Total Expenditures	893,434	4,875,439	63,249	-	2,347,722	474,947	1,613,463	228,386
Revenues (over) under expenditures before transfers	(91,058)	731,570	(296)	-	104,396	12,267	40,897	4,280
Net change in fund balances	(91,058)	731,570	(296)	-	104,396	12,267	40,897	4,280
Fund Balances-Beg of Year Restated	1,222,015	637,260	(42,358)	1,168	288,128	5,856	(104,524)	45,733
Fund Balances-End of Year	1,130,957	1,368,830	(42,654)	1,168	392,524	18,123	(63,627)	50,013

ASSABET VALLEY COLLABORATIVE
STATEMENT OF REVENUE AND EXPENDITURES AND
CHANGES IN FUND BALANCE BY PROGRAM (Continued)
FOR THE YEAR ENDED JUNE 30, 2015

	Evolution Gift	Reach Gift	Building Use Revolving	Insurance Revolving	MOEC Revolving	Evolution Event Club	Program Improve	CF Adams Trust	Grant	Total Programs
Revenues										
Programs										11,298,696
Federal and state grants									27,911	27,911
Other revenue	200		6,091	1,499	2,037	829		-	33,300	43,956
Total Revenues	200	-	6,091	1,499	2,037	829		-	61,211	11,370,563
Expenditures										
Salaries			2,494					2,921	8,663	3,245,476
Therapy										657,907
Other contracted services			395		1,720	773		50,273	41,905	214,555
Transportation									988	4,839,197
Supplies	182	991								79,496
Retirement									123	34,702
Medicare										50,375
Travel										14,293
Liability insurance										6,177
Medical insurance										571,684
Medical services										378,394
Teacher's retirement										23,964
Rent										155,300
Maintenance										43,324
Membership & subscriptions										261
Telephone & utilities										26,345
Equipment									1,000	198,607
Misc. services			2,527		321			37		59,997
Professional development										11,899
Total Expenditures	182	991	5,416	-	2,041	773		53,231	52,679	10,611,953
Revenues (over) under										
expenditures before transfers	18	(991)	675	1,499	(4)	56		(53,231)	8,532	758,610
Net change in fund balances	18	(991)	675	1,499	(4)	56	-	(53,231)	8,532	758,610
Fund Balances-Beg of Year	-	1,390	3,695	1,499	-	-	32,634	53,231	(2,493)	2,143,234
Fund Balances-End of Year	18	399	4,370	2,998	(4)	56	32,634	-	6,039	2,901,844

ASSABET VALLEY COLLABORATIVE

SCHEDULE OF TREASURER'S CASH

JUNE 30, 2015

COMPOSITION OF CASH AT YEAR END:

Cash is comprised of:

Avidia Bank (3 accounts)	Interest Bearing	\$1,668,419
Avidia Bank (2 accounts)	Non-Interest Bearing	25,056
Marlborough Savings Bank (1 account)	Interest Bearing	1,174,090
Marlborough Savings Bank (1 account)	Non-Interest Bearing	<u>15,669</u>
TOTAL CASH		<u>\$2,883,234</u>

ASSABET VALLEY COLLABORATIVE

INFORMATION REQUIRED BY MGL CHAPTER 40

FOR THE YEAR ENDED JUNE 30, 2015

Transactions between the Collaborative and any related for-profit or non-profit organization:

None

Transaction or contracts related to the purchase, sale, rental or lease of real property:

See Note 7 – Lease Disclosures

The duties and total compensation of the 5 most highly compensated employees:

	Title	Total Compensation
C. Cummins	Executive Director	\$134,464
A. Mahan	Director of Finance	\$108,635
K. Laskey	Director of Satellite Programs	\$98,978
N. Ahrabi-Nejad	Director of Consultation Services	\$97,244
S. Van der Swaagh	Co-Director of Therapeutic Programs	\$86,538

The amounts expended on administration and overhead:

Administration and overhead \$821,827

Any accounts held by the Collaborative that may be spent at the discretion of another person or entity:

None

The amounts expended on services for individual age 22 and older:

None

Any other items as may be required by regulation:

None

ASSABET VALLEY COLLABORATIVE

AUDITORS' REPORT PURSUANT TO GOVERNMENT
AUDITING STANDARDS
FOR THE YEAR ENDED JUNE 30, 2015



Business Advisors
Certified Public Accountants

INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS

To the Board of Directors
Assabet Valley Collaborative

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 of Assabet Valley Collaborative, as of and for the year ended June 30, 2015, which comprise the statement of financial position as of June 30, 2015, and the related notes to the financial statements, which collectively comprise Assabet Valley Collaborative's basic financial statements, and have issued our report thereon dated December 2, 2015.

Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered Assabet Valley Collaborative's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the internal control. Accordingly, we do not express an opinion on the effectiveness of Assabet 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 entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

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

In order to ensure accuracy and assist in tracking accounts receivable, management maintains an Excel spreadsheet that is separate and apart from the accounting software. Errors were made in recording prior year (FY 2012 and 2013) receivables in the accounting software package during a transition to an accounts receivable module. These errors were identified in prior periods and over-corrections resulted in errors continuing. While management performs ongoing reviews and reconciliations of current activity within the accounts receivable module, a reconciliation at the consolidated level had not been performed in a timely manner to allow for identification and reconciliation of these discrepancies between the two tracking systems.

Management's Response

The deficiency noted occurred as a result of an FY14 over correction of prior year invoices (FY12 & FY13) not actually owed. In the fall of 2013 (FY14) AVC closed the open invoices which had been identified as not being owed. An audit journal entry made in FY13 was also made to remove the same invoices from accounts receivable (A/R), resulting in an understatement of A/R for FY14.

AVC reconciles revenues and A/R monthly utilizing our financial software Infinite Visions (Budget Sense). We have also used Excel as a cross reference tool to track receipt of receivables based on Budget Sense data. The general ledger report writer within Budget Sense is also used regularly to monitor revenues and expenditures. These reports are also used to provide regular fiscal updates to our Board of Directors.

**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE
AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH
GOVERNMENT AUDITING STANDARDS
(Continued)**

Management's Response (Continued)

As a result of discussions with our auditor regarding this finding, AVC will implement a review/reconciliation with trial balances quarterly.

Compliance and Other Matters

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

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the organization'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 organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Painter, Ratcliffe, Rye & Co. LLC

Franklin, Massachusetts
December 2, 2015



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting



ITEM NO: **X.** **Approval of Minutes**

MEETING DATE: **1/6/16**

SPECIFIC STATEMENT OR QUESTION:

Will the School Committee approve the minutes of the School Committee meeting on November 18, 2015?

BACKGROUND INFORMATION:

1. The minutes are enclosed.

ACTION RECOMMENDED:

That the School Committee approve the amended minutes of the School Committee meeting on November 18, 2015.

STAFF AVAILABLE FOR PRESENTATION:

Mr. John Samia, Chairperson
Ms. Erin Canzano, Secretary

**SHREWSBURY PUBLIC SCHOOLS
100 MAPLE AVENUE
SHREWSBURY, MASSACHUSETTS**

MINUTES OF SCHOOL COMMITTEE MEETING

WEDNESDAY, NOVEMBER 18, 2015

Mr. John Samia, Chairperson; Ms. Sandy Fryc, Vice Chairperson; Ms. Erin Canzano, Secretary; Dr. B. Dale Magee, and Mr. Jon Wensky; Dr. Joseph Sawyer, Superintendent of the Shrewsbury Public Schools; Ms. Mary Beth Banios, Assistant Superintendent; Ms. Barbara Malone, Director of Human Resources; Mr. Patrick Collins, Assistant Superintendent for Finance and Operations

The meeting was convened at 6:19 pm by Mr. Samia.

On a motion made by Dr. Magee, seconded by Ms. Fryc the School Committee voted unanimously to go into executive session for the purpose of a) discussing negotiations with the Shrewsbury Education Association, Unit A; b) for the purpose of reviewing and releasing executive session minutes from a prior meeting at 6:19 PM. Roll call vote was as follows: Dr. Magee, yes; Ms. Canzano, yes; Ms. Fryc, yes and Mr. Samia, yes. Mr. Wensky was not present.

After executive session was adjourned, the meeting was recessed, and then was re-convened at 7:02 PM by Mr. Samia. All members were present.

I. Public Participation

None

II. Chairperson's Report and Members' Reports

None

III. Superintendent's Report

Dr. Sawyer shared that he attended the Unified Basketball team home game. He explained that the program is connected to Special Olympics and involves students with and without disabilities. He congratulated everyone involved in the program and noted that the turnout for the event was remarkable and the whole event was phenomenal. He also reported that the School Calendar and Start Time Committee met for the first time. This representative group, which consists of School Committee advisors, Ms. Fryc and Dr. Magee, along with school administrators, staff, students and community members was established for the purpose of researching and advising him in regards to their findings and recommendations on these topics. Dr. Sawyer also noted that later in the meeting agenda items would address specific topics in the state education news such as state testing.

IV. Time Scheduled Appointments

A. Student Presentation: SHS TV Studio Production Team

Ms. Maggie Korab, SHS Television Studio Production team teacher, and students David Crutchfield, Gwen Kerrigan, Jack Frederick and Declan Quinn made a presentation on the types of school events, collaborative efforts with other student groups and community events that they are involved with throughout the year as part of the television program. The students then presented videos that they

created themselves on subjects that are personal and meaningful to them as part of their classroom assignment.

Committee members asked a few questions such as the prevalence of television studios in other Massachusetts schools, the editing process and future plans related to the field. Committee members and Dr. Sawyer thanked Ms. Korab and commended the students on their innovation, creativity and hard work.

B. Student Presentation: Student Field Study for Marine Ecology

Mr. Bazydlo, SHS principal; Ms. Alex Wilson, SHS Environmental Science/Biology teacher, and SHS students, Matt Freeman and Jake Yankee, made a presentation on the Marine Ecology field study trip they attended in June 2015 to the Gerace Research Center in San Salvador. Ms. Wilson explained that the main objective of the field study was to: 1) investigate relationships between ecological systems and human activities; 2) investigate Bahamian culture; 3) perform protocols related to research methods and techniques, and 4) contribute to ongoing scientific investigations. Ms. Wilson gave an overview of what they did each day, including video footage. The students wrapped up the presentation with details about what they found were the most meaningful experiences during their trip, including investigating caves and boating to some outer reefs to study native species and their habitats.

Committee members commented on the value of these opportunities and asked some clarifying questions about the number of students that participate, collaboration with other students, and how their classroom experiences were connected.

Dr. Sawyer asked Ms. Wilson to elaborate on how the experience has influenced her teaching. He thanked the group for their presentation.

C. Proposed Overnight Student Trips for Marine Biology and TV Production: Votes

Mr. Bazydlo asked the Committee to vote in approval for Ms. Wilson to return to San Salvador for the field study and for Ms. Korab to travel with students to Atlanta to attend the Student Television Network convention.

Dr. Magee expressed his concern regarding the message portrayed by offering these field trip opportunities given that they are costly and may prevent some students from attending. Mr. Bazydlo explained how financial assistance may be provided for students in need, including participating in fundraising events with the Athletics Boosters.

Mr. Samia requested a motion to vote to approve travel by Shrewsbury High School students to the Island of San Salvador to participate in scientific field research in support of the science curriculum during late June/early July 2016 and for Ms. Korab to travel with students to Atlanta in March 2016 to attend the Student Television Network convention. On a motion by Mr. Wensky, seconded by Ms. Fryc, the School Committee voted 4-1 to approve the two overnight field trips, with Dr. Magee dissenting.

V. Curriculum

A. State Testing: Annual Report

Ms. Mary Beth Banios, Assistant Superintendent presented a report regarding the recent developments in state testing. Ms. Banios reviewed the assessment choice that the district made for this past spring's testing, which was the PARCC option. She showed test choice statistics statewide and she also compared performance levels for the PARCC option versus the MCAS test. Ms. Banios addressed key ideas of the

district including that these assessments are primarily used to inform instruction, they are considered just one point of reference, Shrewsbury students continue to score well above the state average, scoring for PARCC is new and should be considered tentatively, and Shrewsbury is in a stronger position to adapt having chosen PARCC.

Next, Ms. Banios highlighted the overall test results by showing comparisons to other districts. She explained that Shrewsbury had a range of scores from first to fourth in comparison to other districts with the strongest test results in ELA for grade 6 and in Math for grade 4. Overall scores were well above state average and have remained fairly level. She then explained the state's formula for determining growth scores. She also discussed the parent reports that families will receive and how to decipher.

Ms. Banios then discussed what is expected to occur in the future with state testing. She referred to the decision made by the Board of Education to transition to a new hybrid format called MCAS 2.0. The impact for Shrewsbury will be that Shrewsbury will continue taking the same PARCC tests this coming spring that were given last year. Going forward, Ms. Banios explained that PARCC would only have one testing window rather than two. For the spring of 2017, testing will continue as is for Grade 10, which is Math and ELA MCAS, grades 5,8, and 9 will take the MCAS 2.0 Science/Tech/Engineering, and grades 5-8 and grades 3-4 will also be administered the MCAS 2.0 in ELA and Math. She also noted that the district would be held harmless from any potential negative accountability ratings. For Spring 2018, it is likely that grade 10 will shift to MCAS 2.0 in ELA and Math and all other testing will remain the same. At that time, accountability ratings are expected to be back in effect and all testing will be online.

B. State Testing: Discussion

Committee members asked various questions such as how much difference there actually is with test results in comparisons with other districts and what technology might be needed for grades 3 and 4 in order to meet the requirements of online testing. Members also expressed their interest in hearing more detailed information once it is compiled and deciphered.

Dr. Sawyer noted that the district considers results of these tests to be only one tool used for assessment of student progress and should not be the primary focus. He indicated that the hope is the hybrid tests being developed will more effectively measure the district's progress towards the rigorous goals and priorities set by the district. He also reaffirmed the district's commitment to continuing its work of preparing students for the future and holding them to high standards.

VI. Policy

A. Updated Policy on Substitute Teachers: First Reading

Mr. Wensky reported that he and Ms. Canzano met with Dr. Sawyer to assess and update policy 314 on substitute teaching. This particular amendment had not been updated since 2002. In particular, amendments would pertain to item number one, which addresses degree requirements; number two, which addresses certification requirements by DESE; and number five, which addresses the provision of information.

Dr. Magee asked a clarifying question around long-term substitute requirements. Ms. Malone and Dr. Sawyer indicated that verbiage for item number two has been updated to reflect the requirements and to be in compliance with state requirements.

VII. Finance and Operations

None

VIII. Old Business

None

IX. New Business

None

X. Approval of Minutes: Vote

Mr. Samia requested a motion to approve the minutes of the School Committee meeting on October 21, 2015 and November 4, 2015. On a motion by Mr. Wensky, seconded by Dr. Magee, the School Committee voted unanimously to approve the minutes of the School Committee meeting on October 21, 2015 and November 4, 2015

XI. Executive Session

Executive session was held prior to the general meeting – see above.

XII. Information Enclosures

None

XIII. Adjournment

Mr. Samia requested a motion to adjourn the School Committee meeting for November 18, 2015. On a motion by Mr. Wensky, seconded by Ms. Fryc, the meeting was adjourned at 8:51PM. On a roll call vote: Dr. Magee, yes; Mr. Wensky, yes; Ms. Canzano, yes; Ms. Fryc, yes; Mr. Samia, yes.

Respectfully submitted
Kimberlee Cantin, Clerk

Documents referenced:

1. SHS TV Studio Production Team Slide Presentation
2. Student Field Study for Marine Biology Slide Presentation
3. State Testing Annual Report Slide Presentation
4. Proposed Updates to Policy #314 on Substitute Teachers



SHREWSBURY PUBLIC SCHOOLS
School Committee Meeting



ITEM NO: XI. Executive Session

MEETING DATE: 1/6/16

SPECIFIC STATEMENT OR QUESTION:

Will the School Committee enter into executive session executive session for the purpose of a) discussing negotiations with the Shrewsbury Education Association, Unit A, where deliberation in an open meeting may have a detrimental effect on the bargaining position of the public body, and/or b) for the purpose of reviewing and/or releasing executive session minutes from a prior meeting?

BACKGROUND INFORMATION:

Executive session is warranted for these purposes.

ACTION RECOMMENDED:

That the School Committee enter into executive session.

STAFF AVAILABLE FOR PRESENTATION:

Ms. Barbara A. Malone, Director of Human Resources
Dr. Joseph M. Sawyer, Superintendent of Schools

ITEM NO: XII. Adjournment