

NATICK PUBLIC SCHOOLS
School Committee Meeting
March 18, 2024
6:00 PM
School Committee Room - 3rd flr, Town Hall

Posted Date: Thursday, March 14, 2024 @ 3:15 PM

Open Meeting 6:00PM, Executive Session 6:05PM, Return to Open Session approximately at 6:30PM. Virtual Meeting Accessed Via: <https://us06web.zoom.us/j/2038566119?pwd=TmtsdxgXenQ0YXRlN1FicHVpd3hEZz09> Meeting ID: 203 856 6119 Passcode: 987179 One tap mobile +13126266799,,2038566119# US (Chicago) +16465588656,,2038566119# US (New York) Dial by your location +1 312 626 6799 US (Chicago) +1 646 558 8656 US (New York) Meeting ID: 203 856 6119 Find your local number: <https://us06web.zoom.us/j/keAEm9sL> . If any member of the public, attending the meeting virtually, wishes to take advantage of public speak, they should email the School Committee Chair, Shai Fuxman at (sfuxman@natickps.org), one hour prior to the start of the meeting. Your email should include your name, town and your request to be called upon during the public speak portion of the agenda. The School Committee Chair will then announce your name and you will be unmuted and prompted to turn on your video for your opportunity to share your remarks. Per our public speak policy, each speaker will have up to 3 minutes.

Posted In Accordance with Provisions of M.G.L. Chapter 30A, Sections 18-25

OPEN SESSION

- Roll Call
- Pledge of Allegiance
- Moment of Silence
- Announcements

EXECUTIVE SESSION - this portion of the meeting is not open to the public
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1. To Discuss Strategy with Respect to Litigation if an Open Meeting may have a Detrimental Effect on the Litigation Position of the Public Body and the Chair So Declares.

PUBLIC SPEAK

Public Speak is scheduled for a period of fifteen minutes. Each speaker will be permitted a maximum of three minutes during which time they can speak about topics within the scope of responsibility of the School Committee. All remarks will be addressed through the School Committee Chair. Public Speak is not a time for debate or response to comments by the School Committee.

- Teacher Representative
- Student Representative

CONSENT AGENDA

1. Approval of Proposed FY25 Fees
2. Approval of ACCEPT Collaborative Agreement - Final Version
3. Approval of Field Trip to Washington D. C. for the NHS Music Department for 2025.

CHAIRMAN'S REPORT

1. Memorial Field Rededication Update

SUBCOMMITTEE/LIAISON UPDATES

1. Policy Subcommittee Update
2. School Committee Handbook Update
3. Adoption of Specialized Code as Specified in the Warrant Article for Spring Town Meeting

SUPERINTENDENT'S REPORT

1. Student Opportunities Act (SOA) Report Follow Up - Sue Balboni/Assist Superintendent for TLI
2. METCO Program Data Presentation - Rasheedah Clayton/METCO Director
3. METCO 2.0 - Rasheedah Clayton/METCO Director
4. MSBA SOI for Memorial School (including preschool classrooms) - Matt Gillis /Assist Superintendent for Finance
5. March 1st Enrollment Report

ACTION ITEMS

1. Approve Student Opportunities Act (SOA) Report
2. Approve MSBA SOI for Memorial School
3. Approve the Recommended FY25 School Budget
4. Approve the Adoption of Specialized Code as Specified in the Warrant Article for Spring Town Meeting

Agenda items will be addressed in an order determined by the chair. Times are approximate.

ITEM TITLE: To Discuss Strategy with Respect to Litigation if an Open Meeting may have a Detrimental Effect on the Litigation Position of the Public Body and the Chair So Declares.

DATE:

ITEM TYPE:

ITEM SUMMARY:

BACKGROUND

INFORMATION:

RECOMMENDATION:

ITEM TITLE: Approval of Proposed FY25 Fees

DATE:

ITEM TYPE:

ITEM SUMMARY: LINK - FY25 Proposed Fees

BACKGROUND INFORMATION:

RECOMMENDATION:

ATTACHMENTS:

Description	File Name	Type
FY25 Proposed Fees	FY25_Fee_Increase_Proposal.docx_(1).pdf	Cover Memo



**Natick Public Schools
Central Office**

Bella Wong,, Superintendent of Schools
Tim Luff, Deputy Superintendent
Matthew Gillis,, Assistant Superintendent for Finance
Sue Balboni, Assistant Superintendent of Teaching, Learning and Innovation

March 18, 2024

FROM: Matthew Gillis
Assistant Superintendent of Finance

TO: Natick School Committee

SUBJECT: FY25 Proposed Fee Increases/Decreases

After a review of all programs offered by the Natick Public Schools, presented for your approval, are the following fee increases/decreases for our programs.

(Beginning in FY19, the school committee recommended an annual review of all fees in order to avoid a large fee increase in any given fiscal year. The recommendation was an annual 2% increase for those programs where a fee increase is justified.

The following are proposed fee increases/decreases for FY25:

ASAP

[Memo: Proposed changes to FY25 Early Risers/ASAP Tuition and Non-Rep Schedule](#)

Aftercare				
Recent History	FY21	FY22	FY23	FY24 thru 2/16/24
Beg Balance	\$ 343,300	\$ 401,837	\$ 628,113	\$ 952,072
Total Revenue	\$ 970,929	\$ 2,286,212	\$ 2,505,621	\$ 1,021,518
Total Exp	\$ 912,392	\$ 2,059,936	\$ 2,181,662	\$ 1,131,441
Ending Balance	\$ 401,837	\$ 628,113	\$ 952,072	\$ 842,148

Summer School/Enrichment Programs

[Memo: Proposed changes to Summer Program Fees](#)

Natick Public Schools does not discriminate on the basis of race, creed, color, sex, gender identity, religion, nationality, sexual orientation, disability, pregnancy and pregnancy-related conditions, physical and intellectual differences, immigration status, or homeless status.

Natick Schools Central Office:

13 East Central Street
Natick MA 01760
<http://www.natickps.org>

508-647-6500 (phone)
508-647-6506 (fax)
www.facebook.com/natickps

Summer School/Enrichment	FY21	FY22	FY23	FY24 thru 2/16/24
Beg Balance	\$ 70,542	\$ 150,338	\$ 331,170	\$ 282,553
Total Revenue	\$ 120,739	\$ 195,763	\$ 188,031	\$ 24,575
Total Exp	\$ 40,943	\$ 14,931	\$ 236,649	\$ 253,954
Ending Balance	\$ 150,338	\$ 331,170	\$ 282,553	\$ 53,174

Summer Special Education Extended Day

This program supports students receiving special education Extended School Year Services(ESY)during the summer morning hours by extending their day to include an afternoon recreational component. It has been difficult to obtain staff to provide this service, and therefore we are requesting this increase to ensure adequate rate of pay for staffing. Shortfall in total fund balance will be covered via special education grant or the General Fund if needed.

FY24 Rate: \$125 per week; FY25 Proposed Rate: \$150 per week.

ESY	FY21	FY22	FY23	FY24 thru 2/16/24
Beg Balance	\$ 25,785	\$ 34,181	\$ 36,249	\$ 50,760
Total Revenue	\$ 8,396	\$ 2,068	\$ 40,832	\$ -
Total Exp	\$ -	\$ -	\$ 26,320	\$ 96,700
Ending Balance	\$ 34,181	\$ 36,249	\$ 50,760	\$ (45,940)

Pre-School

FY24

FY25

3 Morning or Afternoon Session	\$324.73/month \$3,247.27 school year	\$331.22/month (2%) \$3,312.22 school year
4 Morning or Afternoon Sessions	\$432.97/month \$4,329.70 school year	\$441.63/month (2%) \$4,416.30 school year
Full Day Sessions (Wednesdays, half day)	\$1,147.34/month \$11,473.47 school year	\$1,170.29 (2%) \$11,702.90 school year

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Pre-School Tuition				
Recent History	FY21	FY22	FY23	FY24 thru 2/16/24
Beg Balance	\$ 109,849	\$ 3,604	\$ 171,498	\$ 191,519
Total Revenue	\$ 461,992	\$ 807,517	\$ 818,445	\$ 342,918
Total Exp	\$ 568,237	\$ 639,623	\$ 798,424	\$ 343,226
Ending Balance	\$ 3,604	\$ 171,498	\$ 191,519	\$ 191,211

Specialized Tuition Programs: (NORTHSTAR, ACCESS, COMPASS)

Proposed Annual Tuition: \$42,400 (currently \$40,000)

On occasion, with space available, we have allowed students to tuition into our specialized programs to meet students' needs when their sending district is unable to. These programs offer an alternative to placing students in higher cost Out of District Collaboratives or Private Placements for these districts. Our program cost request is specific to the average number of students in each program, the number of staff- teachers, related service providers, paraprofessionals, behavior technicians required to run each program. The proposed increase is based on market adjustments of 6% increase each year for collaborative programs and better reflects salary for supporting the program next year.

Recent History	FY21	FY22	FY23	FY24 thru 2/16
Beg Balance	\$ 111,664	\$ 55,081	\$ -	\$ 13,148
Total Revenue	\$ -	\$ -	\$ 36,800	\$ 38,806
Total Exp	\$ 56,582	\$ 55,081	\$ 23,652	\$ 35,541
Ending Balance	\$ 55,081	\$ -	\$ 13,148	\$ 16,413

Athletic and Rental fee review will be at a following meeting with more detail and analysis.

Note: Special thanks to Tim Luff for his help and background with this memo.

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ITEM TITLE: Approval of ACCEPТ Collaborative Agreement - Final Version

DATE:

ITEM TYPE:

ITEM SUMMARY: [LINK - Summary](#)
[LINK - Proposed Changes](#)
[LINK - Final Version](#)

BACKGROUND INFORMATION:

RECOMMENDATION:

ATTACHMENTS:

Description	File Name	Type
approval of accept collaborative final version	ACCEPT_COLLABORATIVE_AGREEMENT_-_3-6-24-For_School_Committee_Approval.pdf	Cover Memo
accept collaborative summary	ACCEPT_Education_Collaborative_Agreement_-_Summary_of_Revisions_for_Approval.pdf	Cover Memo
accept collaborative proposed changes	ACCEPT_COLLAB_AGREEMENT_-_Redline_Proposed_Revisions_-_3-6-2024.pdf	Cover Memo

ACCEPT Education Collaborative

Articles of Agreement

Amended Pursuant to *MGL c 40, § 4E*

TABLE of CONTENTS

PREAMBLE / AUTHORIZATION.....	3
SECTION I: MEMBERSHIP.....	3
SECTION II: MISSION, OBJECTIVES, FOCUS, AND PURPOSES.....	3
SECTION III: PROGRAMS AND SERVICES.....	4
SECTION IV: GOVERNANCE.....	5
SECTION V: CONDITIONS OF MEMBERSHIP.....	6
SECTION VI: POWERS AND DUTIES OF THE BOARD.....	6
SECTION VII: FINANCE.....	8
SECTION VIII: PROCEDURE FOR AMENDING THE COLLABORATIVE AGREEMENT....	11
SECTION IX: PROCEDURE FOR ADMITTING NEW MEMBER DISTRICTS.....	11
SECTION X: PROCEDURE FOR WITHDRAWAL OF MEMBER DISTRICT.....	12
SECTION XI: PROCEDURE FOR TERMINATION OF A MEMBER SCHOOL DISTRICT...	13
SECTION XII: TERMINATION OF THE COLLABORATIVE AGREEMENT.....	14
SECTION XIV: INDEMNIFICATION.....	15
SECTION XV: COMPLIANCE WITH SECTION 501(c)(3) STATUS.....	16
SECTION XVI: NON-DISCRIMINATION.....	16

ACCEPT Education Collaborative Agreement
Pursuant to *MGL c 40, § 4E*

PREAMBLE/ AUTHORIZATION

This document constitutes the Collaborative Agreement of the ACCEPT Educational Collaborative (hereinafter ACCEPT or the Collaborative), established pursuant to the provisions of MGL Chapter 40, Section 4E of the General Laws of the Commonwealth of Massachusetts and acts or amendments thereof as they may from time to time be enacted by the legislature, and 603 CMR 50.00.

This Agreement replaces the original Agreement dated September 1, 1976, as most recently amended on May 19, 2015, entered into by and between the School Committees and charter school boards which are listed in Section I (hereinafter, the "member districts") and will be effective on July 1, 2024 after the approval of the member districts and the Massachusetts Board of Elementary and Secondary Education as indicated on the signatory page.

SECTION I: MEMBERSHIP

All member districts will appoint their superintendents or charter school board member as their appointed representatives. The membership of the ACCEPT Education Collaborative, as of the effective date of this Agreement, includes the School Committees from the following school districts, as indicated by the Chairs of the School Committees:

- Ashland
- Dover
- Dover-Sherborn
- Framingham
- Franklin
- Holliston
- Hopkinton
- South Middlesex Regional Vocational (Joseph P. Keefe Technical)
- Medfield
- Medway
- Millis
- Natick
- Needham
- Sudbury
- Sherborn
- Wellesley
- Westborough

SECTION II: MISSION, OBJECTIVES, FOCUS, AND PURPOSES

Mission, Purpose and Focus

Since its formation in 1974, ACCEPT Education Collaborative has established trusted partnerships to promote excellence and innovation in educational practice. The mission and purpose of ACCEPT is to leverage the collective power and resources of member school districts to provide excellent, cost-effective regional programs and services to unlock the potential of students, their families, educators and

communities. ACCEPT currently offers a wide range of programs and services whose focus is to minimize the impact of student disabilities or weakness and maximize student outcomes including achievement, independence and participation in the community.

To carry out the mission and purpose of the Collaborative, ACCEPT, acting through its Board of Directors, (hereinafter the Board or Collaborative Board) may contract with corporations, individuals, associations, agencies, and/or any other entities in order to obtain and provide services for a member district. In addition, the Collaborative, with the approval of the Board, will continue to increase and expand its level of service in general and special education, occupational-vocational education, professional development and training, home based and consultative services, research and development of innovative programs, and in any such area determined to be a need of member districts if such new programs are in alignment with ACCEPT's mission, vision and core values.

Objectives of ACCEPT Education Collaborative are to:

- Deliver efficient, cost-effective and high quality programs and services that minimize the impact of student disabilities and maximize student outcomes including achievement, independence and participation in the community
- Develop and implement programs and an array of services that increase educational opportunities for students, families, educators and districts when it is determined that such programs and services can most effectively, efficiently and economically be provided on a Collaborative basis and complement, strengthen and meet the evolving needs of the member districts
- Expand program options in alignment with the mission and purpose of the Collaborative to help districts maximize cost-efficiency and program effectiveness through a Collaborative effort
- Provide safe, reliable and efficient transportation services for students with disabilities
- Offer quality professional development opportunities to general and special education teachers, administrators, and related service providers, focused on closing the achievement gap, preventing unnecessary referrals to special education and personalizing learning for students

SECTION III: PROGRAMS AND SERVICES

ACCEPT will offer cost-effective programs and services deemed appropriate by the Board that complement and supplement the educational programs and services of the member districts. ACCEPT currently provides the following services and programs:

- I. Special education programs, particularly for low incidence populations
2. Special education transportation
3. Home-based parent training
4. Behavioral and educational consultation and assessment services
5. Professional development
6. Support of initiatives from the Massachusetts Department of Elementary and Secondary Education
7. Grant writing and implementation on behalf of school districts
8. Exploration and pursuit of grants and other funding to support identified needs of the member districts
9. Education technology
10. Medicaid reimbursement services

The programs/services listed above are not all-inclusive; the Board, acting at the request of the Executive Director and/or member districts, may consider and approve other programs and services to be provided

by the Collaborative so long as such programs/services are in the best interest of the member districts and are not inconsistent with this agreement and MGL c 40, § 4E and 603 CMR 50.00, et seq., as amended from time to time.

SECTION IV: GOVERNANCE

Each member district executing this Collaborative Agreement shall annually appoint the superintendent of schools or charter school board member to serve as its representative (hereinafter referred to as appointed representatives) on the ACCEPT Education Collaborative Board. The Board shall provide overall management and supervision of ACCEPT. No employee, including the Executive Director, Treasurer, and Business Manager, of the Collaborative may serve on the Board. All appointed representatives and employees shall be public employees subject to MGL c 268A, which requires compliance with the conflict-of-interest law.

It is the function and responsibility of the Board to formulate policy for ACCEPT and to oversee the operation of ACCEPT to the end that the educational needs of students enrolled in its programs are met in an effective and economical way, and that the needs of the member districts for efficient, joint programs and services are addressed.

Each appointed representative shall be entitled to one vote. A quorum for conducting business shall consist of a simple majority of the appointed representatives. A quorum is not needed to close the meeting. In order to pass any motion, a majority vote of the appointed representatives present shall be required, except that a vote to terminate the Collaborative shall require a 2/3 vote of the Board and be approved in accordance with Section XII of this Agreement. The Executive Director, or designee, will act as executive secretary to the Board. The Executive Director shall attend all Board meetings, but shall not be entitled to a vote.

The Board shall hold at least six (6) meetings each fiscal year. The schedule for the meetings will be determined by the Board Chairperson in collaboration with the Executive Director at the last meeting of the year in preparation for the new fiscal year. The Executive Director may call special meetings for special purposes with consent of the Board Chairperson or by the Board Chairperson him/herself. Meetings will be posted in accordance with MGL c 30A §§ 18-25.

At the last Board Meeting of the year, the Board will elect a Chairperson and vice-Chairperson by a majority vote of the appointed representatives present. The Chairperson, by vote of the Board, may appoint such subcommittees or advisory or operating committees of the Board as will facilitate the work of the Board.

Each appointed representative shall be responsible for providing the following information to the representative's member district in accordance with the provisions of MGL c 40, § 4E and 603 CMR 50.00, et seq.

- Quarterly information and updates to the member district, at an open meeting, on the programs and services provided by the Collaborative
- A copy of the Collaborative Agreement and any amendments
- A copy of the annual budget and tuition rate
- A copy of the annual report and financial audit
- Notification of applications for real estate mortgages
- A copy of any capital plan approved by the Board
- Any additional information as may be requested by a vote of the member district or required in MGL c 40 § 4E, 603 CMR 50.00, et seq. and any amendments thereto

SECTION V: CONDITIONS OF MEMBERSHIP

1. Each appointed representative shall be entitled to a vote, which cannot be delegated to any other individual. No appointed representative shall delegate his/her powers or send a representative in his/her place as a voting appointed representative and no member district shall delegate the rights, responsibilities, or duties of its appointed representative to any other individual, unless the member district is replacing the appointed representative with that individual.
2. Each appointed representative is expected to attend each Board meeting. If a representative has missed one half of the meetings within a fiscal year, the Board Chair or Vice Chair will meet with the representative to discuss the representative's attendance and determine a plan for attending Board meetings regularly.

A representative who misses two-thirds of the Board's meetings in a fiscal year will have a letter sent from the Chair or Vice Chair to the School Committee which appointed the representative detailing the lack of attendance, the need for active and regular participation in the business of the Board, and a notice that the representative's participation in the Board will become inactive. An inactive representative will not count toward a quorum and will not have voting rights on the Board but will continue to have other rights and obligations of membership. The Chair, in consultation with the representative, Vice Chair and Executive Director, will determine when an inactive member can resume regular participation on the Board.

3. Each appointed representative must complete the training required by the Department of Elementary and Secondary Education (Department), as outlined in MGL c 40, § 4E and 603 CMR 50.05. Should an appointed representative fail to complete the required training within the timelines set in law and regulations, their member district shall not have voting rights on the Board, but shall continue to have all other rights and obligations of membership. The member district shall become an active member and voting rights shall be reinstated once the appointed representative completes the training.
4. No appointed representative shall be eligible to serve in the positions of Executive Director, Treasurer, Business Manager or a person with responsibilities similar to those of a town accountant, or on the Board of Directors as an officer or employee of any related for-profit or non-profit organization. No employee of the Collaborative may serve on the Board of ACCEPT (603 CMR 50.06 (2) (c)).
5. No appointed representative shall receive an additional salary or stipend for his/her service as a Board member.
6. Each member district will pay a yearly membership fee established by the Board in accordance with Section VII.

SECTION VI: POWERS AND DUTIES OF THE BOARD

The Board shall have all the powers and duties conferred and imposed upon educational Collaborative boards by law and conferred and imposed upon it by this Agreement and such other additional powers and duties as are specified in MGL c 40, §4E, 603 CMR 50.00 and any amendments thereof, or as may be specified in any other applicable general or special law. The Board is responsible for providing fiduciary and organizational oversight and accountability over the operation of the educational Collaborative including but not limited to what follows:

The Board shall:

- Be vested with the authority to enter into agreements with member and non-member districts or other Collaboratives to establish mutually beneficial programs and services or pricing arrangements.
- Ensure adherence to this Agreement and progress toward achieving the purpose and objectives set forth in the Agreement; determine the appropriateness and cost-effectiveness of any borrowing, loans or mortgages,

consistent with Section VII C; approve all expenditures, including contracts, borrowing, and the purchase and sale of real estate; and ensure an annual report and independent financial audit for the previous fiscal year be completed annually and upon approval of the Board be submitted to the Commissioner the State Auditor and Chair of each member district no later than January 1 of each year.

- Ensure the audit report is completed annually and made available on the Collaborative's website and provided upon request.
- Ensure that the Collaborative makes the annual report available on the Collaborative's website and that the Collaborative must provide a printed hard copy of the most recent annual report to members of the public upon request.
- Establish policies to support the operation of ACCEPT, and shall, from time to time, review the policies for their effectiveness and appropriateness.
- Develop/ amend policies on personnel, students, finance and internal controls, and health and nursing.
- Determine the amount of cumulative surplus revenue that may be held by ACCEPT at the end of a fiscal year consistent with the requirements of law and Section VII E of this Agreement; how and under what conditions surplus funds may be returned to member districts or credited to support Collaborative programs and services offered to member districts.
- Appoint the Executive Director, Business Manager, and Treasurer and ensure there is segregation of duties among the Executive Director, Business Manager, and Treasurer. The Board will evaluate the Executive Director and Treasurer annually.
 - o **The Executive Director** shall serve under the general direction of the Board and have the day to day responsibility for all activities of the Collaborative, and shall be responsible for development and implementation and oversight of all of its programs. The Executive Director is responsible for recruitment, retention, supervision and discipline of personnel, with the exception of the Treasurer, and shall be responsible for implementing Board policies and procedures consistent with the policies of the Board. In addition, the Executive Director shall have the authority granted by MGL c 40, §4E and any amendments thereto. The Executive Director shall maintain a website in accordance with MGL c 40 § 4E that shall include the list of appointed representatives serving on the Collaborative Board, copies of the approved Board meeting minutes, a copy of the Collaborative Agreement and any amendments, a copy of the annual report and annual independent audit, and key contact information for the key educational Collaborative staff members. The Executive Director will give public notice of the date, time, location, and agenda items of all Board meetings in accordance with the MGL c 30A, §§ 18-25 pertaining to the open meetings of state governmental bodies. Detailed, accurate records of every meeting will be kept in accordance with the law pertaining to the open meetings and made available on the Collaborative website.
 - o **The Business Manager** shall be subject to MGL c 41, Sec 52 and have the powers and responsibilities, similar to those of a town accountant and consistent with 603 CMR 50.00 and the Board approved job description. The Business Manager may not be the Treasurer of the Collaborative. The Board shall ensure an annual evaluation of such employee's performance and effectiveness.
 - o **The Treasurer**, appointed by the Board, need not necessarily be a Treasurer of a member town, or regional school district. The Treasurer is authorized, subject to the direction of the Board, to receive and disburse all monies of the ACCEPT fund without further appropriation. At the discretion of the Board, the Treasurer may make appropriate investments of ACCEPT's funds when such funds are not immediately necessary for operations, consistent with MGL c 44, § 55B. The Treasurer is also responsible for other tasks as determined by the Board and as stipulated in the Board approved job description, consistent with 603 CMR 50.00. No Collaborative employee or appointed representative to the Board may be the Treasurer. The Treasurer shall report directly to the Board. The Treasurer must give bond annually for the faithful performance of duties as Collaborative Treasurer in a form approved by the department of revenue and in a sum not less than the amount established by the Department as shall be fixed by the Board. The Collaborative Board of Directors shall annually evaluate the treasurer's performance and effectiveness.

- Oversee the operation of the Collaborative to the end that the educational needs of students enrolled in Collaborative programs, as well as the goals of any cooperative program of the Collaborative, are met in an effective and economical way.
- Employ teachers, at least one registered nurse and other professional personnel, and shall enter into contracts for the services of persons who are necessary for the operation of ACCEPT programs and services.
- Ensure that the Collaborative shall annually prepare financial statements, including a statement of net assets (government-wide); statement of activities (government-wide); governmental funds balance sheet; governmental funds statement of revenues, expenditures, and changes in fund balance; general fund statement of revenues, expenditures and changes in fund balance, budget and actual; statement of fiduciary net assets; statement of changes in fiduciary fund net assets; and capital plan identifying current capital obligations or future planned capital projects.
- The Collaborative, acting through its Board of Directors, may subject to chapter 30B, enter into contracts for the purchase of supplies, materials and services and for the purchase or leasing of land, buildings, and equipment as considered necessary by the Board of Directors and which the Board has found to be cost-effective and in the best interests of ACCEPT, the member districts and consistent with Section VII C of this Agreement (Subject to MGL c 30B).
- Create, amend, and repeal all by-laws, policies, and rules for the management and operation of ACCEPT. The Board has all other powers and duties consistent with MGL c 40 §4E.
- Borrow money for any purpose consistent with the terms of this Agreement, including, but not limited to, to meet ongoing payroll obligations, to finance the purchase and/or lease of any real or personal property, including equipment, land, and/or a building(s) (including portables), and/or to finance any renovation, reconstruction and/or construction of any real property.

No employee of the Collaborative may serve on the Board or shall be eligible to serve concurrently in the positions of Executive Director, Treasurer, or Business Manager or person with responsibilities similar to those of a town accountant.

SECTION VII: FINANCE

A. Financial Terms

1. Membership fees shall be assessed to each member district on July 1 of each year. Membership fees are to be used to offset the cost for administration and overhead. Each member district shall be charged membership dues based on a flat rate that offsets some of the administrative and overhead costs of the Collaborative determined annually by the Board as part of the budget process. Capital costs will be included in program fees and tuitions.
2. The remaining administrative costs of the Collaborative will be distributed across all programs operated by the Collaborative through an administration allocation expense proportionate to the operating budget for each program. The proportional share of administrative costs will be added to the operating budget of each program operated by the Collaborative.
3. The Board will set the fees, tuitions, and rates to be charged to districts for all Collaborative services annually based on the cost of providing the program or service. These include tuitions for specialized programs for students, hourly rates for therapy, evaluative, consultative, and the like services, and overhead calculations. Fees, tuitions, and rates will be calculated through the annual budgeting process for each program, including the administrative cost allocation noted in 2 above, with projections based on past usage.
4. Districts will be charged per unit of usage, e.g. per student enrolled, per hour of service delivery, per mile per student on transportation route, per participant enrolled in courses or workshops, or per district for multi-district initiatives. Each type of service may require a different schedule of billing, e.g. 3-4 times per year

for program tuitions, per use for courses/PD, monthly for transportation, etc. Non-member districts will be charged a 20% surcharge on all services to help offset the cost of Collaborative operations.

5. The Board may enter into Agreements with member and non-member districts or other Collaboratives to establish mutually beneficial pricing arrangements.
6. The Collaborative Board may apply, by an appropriate majority vote, for state, federal, corporate, or foundation grants, and may enter into contracts to obtain the funds necessary to carry out the purpose for which the Collaborative was established; and, the Board may accept gifts, grants, or contributions from governmental and private sources, whether in cash or in kind.
7. The Board may enter into contracts to obtain the funds necessary to carry out the purpose for which the Collaborative was established.
8. The Collaborative is subject to MGL c 30B for the procurement of goods and services. Procurement awards require Board approval.

B. Collaborative Fund

The Board shall establish and manage a fund to be known as the *ACCEPT Educational Collaborative Fund* (herein, "the ACCEPT fund"). The ACCEPT fund shall be the depository of all monies paid by the member districts and non-member districts and all grants, gifts, or contracts from the federal government, state government, charitable foundations, private corporations, or any other source; all such monies shall be paid directly to the Collaborative and deposited in the fund.

C. Borrowing

At public meetings of the Board, the Board may authorize the borrowing of funds or enter into short- or long-term agreements or mortgages to acquire or improve real property and/or equipment to support Collaborative operations. The Board shall investigate options related to borrowing, loans, and mortgages in order to determine that the terms are the most favorable available at the time of the application. Through a majority vote, the Board will determine that the terms related to borrowing, loans, or mortgages are cost-effective and are the most favorable available at the time of the application; and shall determine, through a majority vote, that the borrowing, loans, and mortgages are necessary to carry out the purposes for which the Collaborative is established, in the best interest of the Collaborative and its member districts and consistent with the terms of the Collaborative Agreement.

In the event that such borrowing, loan or mortgage is for the acquisition or improvement of real property the Board shall provide notice to each member district within 30 calendar days of applying for real estate mortgages; and discuss its intent to apply for a real estate mortgage at a public meeting of the Board prior to the meeting of the Collaborative Board at which the final vote is taken; see 603 CMR 50.07(8).

D. Capital Reserve Fund

ACCEPT may create a capital reserve fund to support costs associated with the acquisition, maintenance, and/or improvement of fixed assets, including real property, pursuant to a capital plan. Funds in a capital reserve fund may be used only for the project or purpose for which the account was established. The establishment of a capital reserve shall be subject to the approval of two-thirds of the member districts.

The request for approval must state the reason for the reserve and a limit on the balance that may be held in the reserve. Deposits into the capital reserve shall be proposed and approved through the budget process.

In the event that the purpose for which the capital reserve was created requires modification, the Collaborative Board shall revise its capital plan and provide notice to all member districts. If the member district does not vote to disapprove the revised capital plan within a 45-day period, that member district shall be deemed to have approved the revised capital plan. Two-thirds (2/3) approval of the member districts is required to revise the capital plan.

E. Surplus Funds

Unexpended general funds, as defined in 603 CMR 50.00, at the end of the fiscal year plus any previous year's surplus funds, as determined through the financial statements, will be considered cumulative surplus. The determination of cumulative surplus shall not include funds deposited in a capital reserve as provided for in 603 CMR 50.07(10), funds deposited in trust in accordance with MGL c 32B, § 20, and any amounts prepaid for tuition or services in accordance with MGL c 40, § 4E.

The Board will retain no more than 25 percent in cumulative surplus, in accordance with 603 CMR 50.03(5)(b) 10. On an annual basis, after the Board has discussed the audit results of the previous fiscal year, the Board shall approve, by majority vote, the final dollar amount of the cumulative surplus. The Board shall determine whether such final dollar amount of surplus funds is within the established 25 percent limit, and whether the funds will be retained by the Collaborative or whether all or some portion will be refunded to the member districts or credited to support programs and services offered to member districts by the Collaborative.

In the event an amount is to be refunded to the member districts, each member district share will be apportioned in accordance with the percentage of usage in the program/service area that generated the surplus for the previous fiscal year, as determined by the annual financial audit.

F. Annual Budget Preparation and Assessment of Costs

The Board shall annually determine the Collaborative budget consistent with the timelines, terms, and requirements in MGL c 40, § 4E and 603 CMR 50.00. The Board shall identify the programs or services to be offered by Collaborative in the upcoming fiscal year and the corresponding costs. In the fall of each year, the Executive Director will consult with staff, look at trends and examine the prior year profit and loss statements to formulate and project expenses for the next fiscal year to run each program. The budget assumptions are based on the mission and core values of the Collaborative. The proposed budget shall contain all planned financial activity for all programs offered by the Collaborative for the upcoming fiscal year classified into line item categories.

The line item projections include but are not limited to needed staff, supplies, rent, materials and equipment to run the program. Fees for service are determined by computing the expenses vs. the projected participation in each program for the next fiscal year. Forecasting of students that will be enrolled in special education and transportation programs in the next fiscal year is based on past history and ongoing discussions with key constituent leaders from member districts.

The projected budget and fee structure is presented to the Finance and Budget Subcommittee, a subset of the appointed representatives, for feedback and review prior to presentation to the full Board. The Board shall hold a public meeting on the proposed budget prior to its adoption and shall adopt the final budget by an affirmative majority vote at a subsequent meeting no earlier than ten (10) working days after the Board meeting at which the Collaborative budget was first proposed but no later than May 30 of the preceding fiscal year. The Treasurer shall certify and transmit the budget and the tuition rates, membership dues and fees-for-service for the upcoming fiscal year to each member district not later than June 30 of the preceding fiscal year. Adoption of the budget shall require a majority vote of the appointed representatives to the Board.

G. Budget Amendments

The Collaborative Board must approve all budget amendments including but not limited to those that decrease the budget and move those funds across line items. Any amendment to the budget that results in an increase in the tuition rates, membership dues or fees for services shall adhere to the following procedures:

- a. All appointed representatives shall, within ten (10) working days of the public meeting at which the amendment was first proposed, report to their member districts the content of the proposed

amendment

- b. The Board at a second public meeting of the Board next following the Board meeting at which the amendment was first proposed shall vote on all amendments; adoption shall require a majority vote
- c. The Treasurer shall certify and transmit the amended tuition rates, membership dues and fees for services to each member district not later than ten (10) working days following the affirmative vote of the Board

H. Payment Terms

ACCEPT shall submit invoices to member and non-member districts for program tuitions on a quarterly basis. Fees for services to member and non-member districts will be billed on a monthly basis. Membership fees will be invoiced quarterly and paid within thirty (30) days of receipt of the ACCEPT invoice. Districts will pay for programs and services within thirty (30) days of receipt of ACCEPT's invoice.

I. Financial Accounting System

The Collaborative shall adopt and maintain a financial accounting system, in accordance with generally accepted accounting principles as prescribed by the governmental accounting standards board and any supplemental requirements prescribed jointly by the commissioner of elementary and secondary education and the commissioner of revenue, in consultation with the state auditor. At a minimum, the financial accounting system shall delineate: administration and overhead; rental of real property; program costs; capital expenditures, including fixed assets, real property or the improvement of real property; debt payments; deposits into a capital reserve; and all additional disclosures required in 50.08(2).

SECTION VIII: PROCEDURE FOR AMENDING THE COLLABORATIVE AGREEMENT

Any member district, any appointed representative, or the Executive Director, may initiate a proposal for amendment of this Agreement. The proposed amendment shall be presented in writing to the Executive Director of the Board no less than ten (10) days prior to a meeting of the Board at which it shall first be read. The proposed amendment shall be read a second time at the regular meeting next subsequent to its first majority reading, at which time it may be approved by a two-thirds (2/3) vote of the Board. If approved by the Board, the proposed amendment shall then be submitted to member districts. If approved by a simple majority of member districts the proposed amendment shall be submitted for approval to the Board of Elementary and Secondary Education; following approval the proposed amendment shall become effective.

SECTION IX: PROCEDURE FOR ADMITTING NEW MEMBER DISTRICTS

A new School Committee or Charter School Board may be added to ACCEPT consistent with approval of the Board and subsequent to amendment of the ACCEPT Collaborative Agreement, consistent with the provisions of Section VIII, MGL c 40, § 4E, and 603 CMR 50.03 and Department guidelines, to reflect such membership. The applicant School Committee or Charter School Board shall apply in writing for admission to ACCEPT no later than December 31 of the fiscal year prior to the fiscal year in which the applicant School Committee or Charter School Board seeks membership. A School Committee or Charter School Board may be admitted to the Collaborative as of July 1st provided that all required approvals, including that of the Board of Elementary and Secondary Education, are obtained by the preceding April 30th prior to the fiscal year in which the new member School Committee or Charter School Board is to be admitted to the Collaborative. If the process for amendment of the ACCEPT Agreement has not been finalized by April 30th, the new member district may appoint a non-voting representative to the ACCEPT Board for the subsequent fiscal year. During the first year of membership, a newly admitted district will pay a 10% surcharge for all programs and services. During the second year of membership, the surcharge will be reduced to 5%; in the following years, member district rates will apply.

SECTION X: PROCEDURE FOR WITHDRAWAL OF MEMBER DISTRICT

Any member district may withdraw from ACCEPT at the end of any fiscal year, provided that all necessary approvals have been obtained consistent with 603 CMR 50.00 et seq. subject to the following terms:

- A. At least 180 days prior to the end of the current fiscal year, the withdrawing member district shall provide written notice to every other member district that is party to this Agreement as well as to the Executive Director of the Collaborative and the Collaborative Board of intent to withdraw.
- B. Written notification of a member district's intent to withdraw from the Collaborative at the end of a fiscal year shall include the following:
 1. Notification addressed to the Chair of the Board and the Executive Director that the member district has voted to withdraw from the Collaborative with the effective date of withdrawal; and
 2. A copy of the minutes from the School Committee meeting in which the member district voted to withdraw from the Collaborative.
- C. Within thirty (30) days of notification of a member district's intent to withdraw from the Collaborative, an amendment shall be prepared to reflect changes in the Agreement caused as a result of the change in membership of the Collaborative.
- D. Upon a two-thirds (2/3) affirmative vote of the Board, the Collaborative Agreement will be amended to withdraw the exiting member district. The Collaborative Agreement shall be amended consistent with Section VIII of this Agreement. The withdrawal is not in effect until and unless the Board of Elementary and Secondary Education has approved the withdrawal by April 30th of the fiscal year in which the withdrawal is to occur.
- E. Upon withdrawal from the Collaborative, a former member district shall not be entitled to any assets or a portion of any assets of the ACCEPT Collaborative, including any surplus funds that may have been carried over from prior years and any capital reserve fund that may have been established by the Board.
- F. Any member district who has voluntarily withdrawn from the Collaborative will continue to be liable to the Collaborative for its share of any debts, claims, demands, or judgment incurred, including obligations for post-employment benefits incurred during the district's membership in the Collaborative, against the Collaborative based on the member district's average per pupil enrollment in the Collaborative, in any Collaborative service, over the prior ten (10) fiscal years.
- G. A withdrawing member district will be charged a one-time exit fee, equal in amount to the annual membership fee established by the Board. This fee will be due prior to the end of the fiscal year that would mark the withdrawing district's final year as a member of the Collaborative.
- H. Following the final audit of that fiscal year's financial records, the withdrawing district will be reimbursed any funds that remain on balance at the Collaborative as a result of prepayments to the Collaborative by the member district for tuition or services under MGL c 40, § 4E.
- I. The withdrawal of any member district(s) at any time shall not affect the status of the Collaborative Agreement and the same shall remain in full force and effect until amended and approved by a 2/3 majority of the Board and subsequently approved by the majority of the member districts and the Board of Elementary and Secondary Education. Board.
- J. Any School Committee or Charter School Board who has voluntarily withdrawn from the Collaborative may re-apply for admission to the Collaborative in accordance with Article IX of this Agreement.

SECTION XI: PROCEDURE FOR TERMINATION OF A MEMBER SCHOOL DISTRICT

The Board may vote to initiate the termination of the membership of any member district by a two-thirds (2/3) vote of the entire voting membership of the Board. The only reasons for such action shall be:

- I. The non-payment of certain obligations such as the non-payment of fees or assessments owed to the Collaborative; or
2. Any other action that would seriously jeopardize the financial stability of the Collaborative

Procedure for such termination:

- I. The Executive Director of the Collaborative, with the authorization of the chairperson of the Board, must provide written notice to the member district of the facts on which any possible termination action may be based. This notice must give the member district thirty (30) days to correct the situation.
2. The member district may work with the Executive Director and the Board Chair to develop a plan to address the situation.
3. If the member district does not correct the situation within thirty (30) days, then the Board shall schedule the vote to terminate that district's membership at the next Board meeting, which is scheduled sixty (60) days after the expiration of the thirty (30) day period referenced in Paragraph 1.
4. The Executive Director shall provide written notice to the chairperson of the member district's school committee and to the superintendent of that member school district of the date and time for the meeting at which the Board will consider initiation of termination of that member district's participation in the Collaborative. The notice will include a copy of the proposed amendment to this Agreement reflecting the termination of the member district. Such written notice shall be sent by certified mail or by overnight mail, both of which require acknowledgement of receipt of the written notice. In the written notice, the Board shall invite the member district to present any and all reasons why the Board should not terminate membership.
5. Whether or not the member district appears at the Board meeting at which the initiation of termination of membership is to be discussed, the Board shall vote on the motion to initiate the termination the member district's participation in the Collaborative and on the amendment to the Agreement reflecting such termination. In order to initiate the termination of the membership, the Board must vote by two-thirds majority to do so and an amendment shall be prepared in accordance with Section VIII and submitted to the member districts and to the Board of Elementary and Secondary Education for approval. . Termination of the member district shall not be effective until the Collaborative has fully complied with Article VIII of this Agreement, the member districts have approved the amendment and the Board of Elementary and Secondary Education has approved the amendment to the Agreement.
6. The effective date of a member district's termination from the Collaborative shall take effect on the next July 1 provided that the procedure outlined in paragraphs 1-5 has been completed by April 30.
7. Upon termination from the Collaborative, a former member district shall not be entitled to any assets or a portion of any assets of the ACCEPT Collaborative, including any surplus funds that may have been carried over from prior years and any capital reserve fund that may have been established by the Board.
8. Any member district of which membership has been terminated will continue to be liable to the Collaborative for its share of any debts, claims, demands, or judgment incurred, including obligations for post-employment benefits incurred during the district's membership in the Collaborative, against the Collaborative based on the member district's

average per pupil enrollment in the Collaborative, in any Collaborative service, over the prior ten (10) fiscal years.

SECTION XII: TERMINATION OF THE COLLABORATIVE AGREEMENT

The Executive Director, any appointed representative of the Board, or a member district may propose the termination of the Collaborative by submitting such a proposal in writing to the Chairperson of the Board and, by giving notice to all other member districts and the Executive Director at least twelve (12) months before the end of the current fiscal year.

Within thirty (30) days of a request that the Board initiate termination proceedings, the Board shall discuss the request to terminate the Collaborative and determine next steps. The Collaborative may only be terminated at the end of any fiscal year (June 30) by a two-thirds (2/3) vote of the entire Board, subject to compliance with this section of this Agreement and compliance with the closing guidelines of the Department.

Should the Board vote to initiate termination proceedings, notice must be provided to all member districts within ten (10) working days of such vote. Any Board vote to terminate the Collaborative must be confirmed by a vote of two-thirds (2/3) of the member districts. Following the affirmative votes to terminate this Collaborative Agreement, the Executive Director shall inform the member and non-member districts who are served by the Collaborative and the Department in writing 180 days prior to the effective date of any termination along with the information required to be submitted to the Department pursuant to 603 CMR 50.11.

Prior to ACCEPT's termination, the ACCEPT Board shall arrange for a final fiscal audit of ACCEPT Collaborative. Such audit will be completed within ninety (90) days of the date of termination of ACCEPT. A copy of such audit report shall be sent to each member district and to the Department. Such audit must be completed before any assets (or liabilities) are disbursed.

By January 31 of the fiscal year in which the termination shall occur, the ACCEPT Board will:

1. Determine the appropriate disposition of the ACCEPT Collaborative funds, equipment and supplies
2. Determine the fair market value of all assets for the Collaborative, including, but not limited to, real estate, capital property, equipment and supplies owned by the Collaborative;
3. Determine the process for the appropriate disposition of federal/state funds.
4. Identify the member district responsible for maintaining all fiscal, employee and program records.
5. Identify the member and non-member district(s) responsible for maintaining student records.
6. Determine the means of meeting all liabilities (debts and obligations) of the Collaborative, including obligations for post-employment benefits. All liabilities must be met before any monies are distributed to member districts.
7. Ensure the appropriate disposition of all assets of the Collaborative, including any unencumbered funds held by the Collaborative, and any capital property and real estate owned by the Collaborative. Unless the Board determines otherwise, all assets shall be sold and the monies shall be distributed to the member districts based on the member district's average per pupil enrollment in the Collaborative, in any Collaborative service, over the prior ten (10) fiscal years, ensuring fairness and equity for all members.
8. Determine the plans for member districts to address the needs of students that were being addressed by the Collaborative.

No part of the net earnings of the Collaborative shall inure to the benefit of any appointed representative, Executive Director, or any private individual (except that reasonable compensation may be paid for services rendered to or for the Collaborative by a private individual who is not a member, director or

officer of the Collaborative), and no appointed representative or officer shall be entitled to share in the distribution of any of the assets upon dissolution of the Collaborative.

Following the affirmative vote of the member districts to terminate the Collaborative Agreement the Board shall notify the Department of the official termination date of the Collaborative, and shall submit the documentation required by 603 CMR 50.11 to the Department.

If the Collaborative receives a notice of intent to revoke approval of its Agreement, it shall immediately begin planning for termination of the Collaborative by providing notice to member districts and non-member districts and by following the procedures of 603 CMR 50.11.

SECTION XIII: INDEMNIFICATION

Neither the Executive Director nor any member of the Board shall be liable to the Collaborative or to any member district hereof for any act or omission of the Executive Director or any member of the Board or be held personally liable in connection with the affairs of the Collaborative except only liability arising out of his own willful misfeasance, bad faith, gross negligence or reckless disregard of duty to the Collaborative or its member districts.

Neither the Executive Director nor any member of the Board shall be personally liable for any debt, claim, demand, judgment, decree, liability or obligation of any kind of, against, or with respect to the Collaborative or arising out of any action taken or omitted for or on behalf of the Collaborative and the Collaborative shall be solely liable therefore and resort shall be had exclusively to the Collaborative property for the payment or performance thereof and each member of the Board and any Executive Director shall be entitled to full indemnity and full reimbursement out of Collaborative property, including, without limitation, fees and disbursements of counsel, if, contrary to the provisions hereof, such Board member or Executive Director shall be held personally liable. Any person dealing with the Collaborative shall be informed of the indemnification contained herein and, where the Board deems it appropriate, documents or instruments executed by or by authority of the Board shall contain reference hereto.

The Executive Director and his/her legal representatives and each Board member and his/her legal representatives shall be indemnified by the Collaborative against all liabilities and expenses, exclusive of amounts paid to the Collaborative, including judgments, fines, penalties, amounts paid in settlement and counsel fees, incurred in reasonable settlement of any action, suit or proceeding to which such member of the Board or Executive Officer or his/its legal representatives may be made a party or otherwise involved by reason of his/its capacity as member of the Board or Executive Officer, except only liabilities and expenses arising out of his/its own willful misfeasance, bad faith, gross negligence or reckless disregard of duty to the Collaborative as final adjudged in such action or, in the event of settlement or termination of such action without final adjudication, as determined by independent counsel for the Collaborative. Said right of indemnification shall be in addition to any other rights to which such member of the Board or Executive Officer may be entitled as a matter of law or which may be lawfully granted to him/it.

The costs of such liabilities or expenses which are not borne by the ACCEPT's insurance carriers shall be apportioned among, assessed to and paid by the member districts that were members of ACCEPT at the time of the occurrences giving rise to the liability or expenses, whether or not any such member district has thereafter withdrawn from ACCEPT, in accordance with the provisions concerning the apportionment, assessment and payment of operating costs applicable at the time of the occurrences giving rise to the liability or expense.

SECTION XIV: COMPLIANCE WITH SECTION 501(c)(3) STATUS

Notwithstanding any other provision of these articles, the ACCEPT Education Collaborative, while a public entity, is organized exclusively for educational purposes, as specified in Section 501(c) (3) of the Internal Revenue Code, and shall not carry on any activities not permitted to be carried on by any entity exempt from Federal income tax under Section 501 (c) (3) of the Internal Revenue Code.

No substantial part of the activities of the Collaborative shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Collaborative shall not participate in or intervene in (including the publication or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

SECTIONXIV: NON-DISCRIMINATION

The ACCEPT Education Collaborative does not discriminate on the basis of race, color, sex, gender identity, religion, national origin, disability or sexual orientation and ensures that all students have equal rights of access and equal enjoyment of the opportunities, advantages, privileges and courses of study. The Board's policy of nondiscrimination will extend to students, staff, the general public, and individuals with whom it does business.

The ACCEPT Education Collaborative is an Equal Opportunity Employer.

This Agreement shall take effect on July 1, 2024, and subsequent to the of approval of the member school districts and by the Board of Elementary and Secondary Education, as previously outlined in this Agreement and shall continue indefinitely. This Agreement has been approved by duly authorized votes at public meetings held by the individual School Committees and Charter School Boards whose Chairpersons have signed below.

Date of first reading: 12/13/2023

Date of second reading: 3/6/2024

Date approved by Collaborative Board of Directors: _____

Dates approved by member School Committees/Charter School Boards:

_____ Chairperson, School Committee of Town of Ashland	_____ Date of Vote
_____ Chairperson, School Committee of Town of Dover	_____ Date of Vote
_____ Chairperson, School Committee of Dover/Sherborn Regional School District	_____ Date of Vote
_____ Chairperson, School Committee of Town of Framingham	_____ Date of Vote
_____ Chairperson, School Committee of Town of Franklin	_____ Date of Vote
_____ Chairperson, School Committee of Town of Holliston	_____ Date of Vote
_____ Chairperson, School Committee of Town of Hopkinton	_____ Date of Vote
_____ Chairperson, School Committee of Town of Medfield	_____ Date of Vote
_____ Chairperson, School Committee of Town of Medway	_____ Date of Vote
_____ Chairperson, School Committee of Town of Millis	_____ Date of Vote
_____ Chairperson, School Committee of Town of Natick	_____ Date of Vote
_____ Chairperson, School Committee of Town of Needham	_____ Date of Vote

_____ Chairperson, School Committee of South Middlesex Regional	_____ Date of Vote
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_____ Chairperson, School Committee of Town of Sudbury	_____ Date of Vote
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_____ Chairperson, School Committee of Town of Sherborn	_____ Date of Vote
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_____ Chairperson, School Committee of Town of Wellesley	_____ Date of Vote
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_____ Chairperson, School Committee of Town of Westborough	_____ Date of Vote
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Approved on behalf of the Massachusetts Board of Elementary and Secondary Education by:

_____ Commissioner	_____ Effective Date
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Center for Learning and Growth • 4 Tech Circle, Natick, MA 01760
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Transportation • 508.620.3875 • 508.655.5008 Fax

ACCEPT Education Collaborative Summary of Collaborative Agreement Amendments

1. There are many wordsmithing changes by DESE representatives throughout the document.
2. Section XIII - General Provisions removed from Table of Contents and document.
3. Section I - Westborough Public School District added as a member
4. Section V - Conditions of Membership #2 - Reworded the language regarding a Representative Board Member that is not appropriately attending and participating in Board meetings.
5. Section XIV - Non-Discrimination the date of July 1, 2024 added as expected date for the amendment to take effect.

Once each Collaborative member district School Committee reviews and approves the revisions to the Agreement they will return the signed and dated signature sheet to ACCEPT. When all member district signature pages have been returned to ACCEPT, the Agreement will be forwarded to the Commissioner for review and approval.

Red line Version – Proposed Revisions

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ACCEPT Education Collaborative

Articles of Agreement

Amended Pursuant to *MGL c 40, § 4E*

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Effective 07/01/2024

TABLE of CONTENTS

PREAMBLE / AUTHORIZATION.....	3
SECTION I: MEMBERSHIP	3
SECTION II: MISSION, OBJECTIVES, FOCUS, AND PURPOSES.....	3
SECTION III: PROGRAMS AND SERVICES.....	4
SECTION IV: GOVERNANCE	5
SECTION V: CONDITIONS OF MEMBERSHIP	6
SECTION VI: POWERS AND DUTIES OF THE BOARD	7
SECTION VII: FINANCE.....	9
SECTION VIII: PROCEDURE FOR AMENDING THE COLLABORATIVE AGREEMENT	12
SECTION IX: PROCEDURE FOR ADMITTING NEW MEMBER DISTRICTS.....	12
SECTION X: PROCEDURE FOR WITHDRAWAL OF MEMBER DISTRICT	13
SECTION XI: PROCEDURE FOR TERMINATION OF A MEMBER SCHOOL DISTRICT	14
SECTION XII: TERMINATION OF THE COLLABORATIVE AGREEMENT	15
SECTION XIII: GENERAL PROVISIONS.....	16
SECTION XIV: INDEMNIFICATION	16
SECTION V : COMPLIANCE WITH SECTION 501(c)(3) STATUS.....	18
SECTION XVI : NON-DISCRIMINATION	18

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ACCEPT Education Collaborative Agreement
Pursuant to *MGL c 40, § 4E*

PREAMBLE / AUTHORIZATION

This document constitutes the Collaborative Agreement of the ACCEPT Educational Collaborative (hereinafter ACCEPT or the Collaborative), established pursuant to the provisions of MGL Chapter 40, Section 4E of the General Laws of the Commonwealth of Massachusetts and acts or amendments thereof as they may from time to time be enacted by the legislature, and 603 CMR 50.00.

This Agreement replaces the original Agreement dated September 1, 1976, as most recently amended on May 19, 2015, entered into by and between the School Committees and charter school boards which are listed in Section I (hereinafter, the “member districts”) and will be effective upon the approval of the member districts and the Massachusetts Board of Elementary and Secondary Education as indicated on the signatory page.

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SECTION I: MEMBERSHIP

All member districts will appoint their superintendents or charter school board member as their appointed representatives. The membership of the ACCEPT Education Collaborative, as of the effective date of this Agreement, includes the School Committees from the following school districts, as indicated by the Chairs of the School Committees:

- Ashland
- Dover
- Dover-Sherborn
- Framingham
- Franklin
- Holliston
- Hopkinton
- South Middlesex Regional Vocational (Joseph P. Keefe Technical)
- Medfield
- Medway
- Millis
- Natick
- Needham
- Sudbury
- Sherborn
- Wellesley
- Westborough

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SECTION II: MISSION, OBJECTIVES, FOCUS, AND PURPOSES

Mission, Purpose and Focus

Since its formation in 1974, ACCEPT Education Collaborative has established trusted partnerships to promote excellence and innovation in educational practice. The mission and purpose of ACCEPT is to leverage the collective power and resources of member school districts to provide excellent, cost-effective

regional programs and services to unlock the potential of students, their families, educators and communities. ACCEPT currently offers a wide range of programs and services whose focus is to minimize the impact of student disabilities or weakness and maximize student outcomes including achievement, independence and participation in the community.

To carry out the mission and purpose of the Collaborative, ACCEPT, acting through its Board of Directors, (hereinafter the Board or Collaborative Board) may contract with corporations, individuals, associations, agencies, and/or any other entities in order to obtain and provide services for a member district. In addition, the Collaborative, with the approval of the Board, will continue to increase and expand its level of service in general and special education, occupational-vocational education, professional development and training, home based and consultative services, research and development of innovative programs, and in any such area determined to be a need of member districts if such new programs are in alignment with ACCEPT's mission, vision and core values.

Objectives of ACCEPT Education Collaborative are to:

- Deliver efficient, cost-effective and high-quality programs and services that minimize the impact of student disabilities and maximize student outcomes including achievement, independence and participation in the community
- Develop and implement programs and an array of services that increase educational opportunities for students, families, educators and districts when it is determined that such programs and services can most effectively, efficiently and economically be provided on a Collaborative basis and complement, strengthen and meet the evolving needs of the member districts
- Expand program options in alignment with the mission and purpose of the Collaborative to help districts maximize cost-efficiency and program effectiveness through a Collaborative effort
- Provide safe, reliable and efficient transportation services for students with disabilities
- Offer quality professional development opportunities to general and special education teachers, administrators, and related service providers, focused on closing the achievement gap, preventing unnecessary referrals to special education and personalizing learning for students

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SECTION III: PROGRAMS AND SERVICES

ACCEPT will offer cost-effective programs and services deemed appropriate by the Board that complement and supplement the educational programs and services of the member districts. ACCEPT currently provides the following services and programs:

1. Special education programs, particularly for low incidence populations
2. Special education transportation
3. Home-based parent training
4. Behavioral and educational consultation and assessment services
5. Professional development
6. Support of initiatives from the Massachusetts Department of Elementary and Secondary Education
7. Grant writing and implementation on behalf of school districts
8. Exploration and pursuit of grants and other funding to support identified needs of the member districts
9. Education technology
10. Medicaid reimbursement services

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The programs/services listed above are not all-inclusive; the Board, acting at the request of the Executive Director and/or member districts, may consider and approve other programs and services to be provided by the Collaborative so long as such programs/services are in the best interest of the member districts and are not inconsistent with this agreement and MGL c 40, § 4E and 603 CMR 50.00, et seq., as amended from time to time.

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SECTION IV: GOVERNANCE

Each member district executing this Collaborative Agreement shall annually appoint the superintendent of schools or charter school board member to serve as its representative (hereinafter referred to as appointed representatives) on the ACCEPT Education Collaborative Board. ~~An appointed representative of the Commissioner of Elementary and Secondary Education shall be a voting member of the Board.~~ The Board shall provide overall management and supervision of ACCEPT. No employee, ~~including the Executive Director, Treasurer, and Business Manager,~~ of the Collaborative may serve on the Board. All appointed representatives and employees shall be public employees subject to MGL c 268A, which requires compliance with the conflict-of-interest law.

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It is the function and responsibility of the Board to formulate policy for ACCEPT and to oversee the operation of ACCEPT to the end that the educational needs of students enrolled in its programs are met in an effective and economical way, and that the needs of the member districts for efficient, joint programs and services are addressed.

A quorum for conducting business shall consist of a simple majority of the appointed representatives. A quorum is not needed to close the meeting. In order to pass any motion, a majority vote of the appointed representatives present shall be required, except that a vote to terminate the Collaborative shall require a 2/3 vote of the Board and be approved in accordance with Section XII of this Agreement. The Executive Director, or designee, will act as executive secretary to the Board. The Executive Director shall attend all Board meetings, but shall not be entitled to a vote.

Deleted: Each appointed representative shall be entitled to one vote.

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The Board shall hold at least six (6) meetings each fiscal year. The schedule for the meetings will be determined by the Board Chairperson in collaboration with the Executive Director at the last meeting of the year in preparation for the new fiscal year. The Executive Director may call special meetings for special purposes with consent of the Board Chairperson or by the Board Chairperson him/herself. Meetings will be posted in accordance with MGL c 30A §§ 18-25. At the last Board Meeting of the year, the Board will elect a Chairperson and vice-Chairperson by a majority vote of the appointed representatives present. The Chairperson, by vote of the Board, may appoint such subcommittees or advisory or operating committees of the Board as will facilitate the work of the Board.

Each appointed representative shall be responsible for providing the following information to the representative's member district in accordance with the provisions of MGL c 40, § 4E and 603 CMR 50.00, et seq.

- Quarterly information and updates to the member district, at an open meeting, on the programs and services provided by the Collaborative
- A copy of the Collaborative Agreement and any amendments
- A copy of the annual budget and tuition rate
- A copy of the annual report and financial audit
- Notification of applications for real estate mortgages

Commented [HR(5)]: You may want to add, "and any regional collaborative efforts" language from the amended regulations.

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- A copy of any capital plan approved by the Board
- Any additional information as may be requested by a vote of the member district or required in MGL c 40 § 4E, 603 CMR 50.00, et seq. and any amendments thereto

SECTION V: CONDITIONS OF MEMBERSHIP

1. Each appointed representative shall be entitled to a vote, which cannot be delegated to any other individual. No appointed representative shall delegate his/her powers or send a representative in his/her place as a voting appointed representative and no member district shall delegate the rights, responsibilities, or duties of its appointed representative to any other individual, unless the member district is replacing the appointed representative with that individual.

Commented [GP(6): Add "...for each district they represent,"

Commented [GP(7R6): See earlier comment and maintain consistency throughout.

Commented [GP(8R6): See earlier comment. Pj will research.

1. Each appointed representative is expected to attend each Board meeting. If a representative has missed one half of the meetings within a fiscal year, the Board Chair or Vice Chair will meet with the representative to discuss the representative's attendance and determine a plan for attending Board meetings regularly.

A representative who misses two-thirds of the Board's meetings in a fiscal year will have a letter sent from the Chair or Vice Chair to the School Committee which appointed the representative detailing the lack of attendance, the need for active and regular participation in the business of the Board, and a notice that the representative's participation in the Board will become inactive. An inactive representative will not count toward a quorum and will not have voting rights on the Board but will continue to have other rights and obligations of membership. The Chair or Vice-Chair, in consultation with the representative, will determine when an inactive member can resume regular participation on the Board.

2. ~~Each appointed representative is expected to attend every Board meeting. If an appointed representative has missed one half (1/2) of the meetings within a fiscal year, the Board Chair or Vice chair and/or Executive Director will meet with the appointed representative to discuss attendance. Notice will be given to the appointing member district within a week of the meeting in an attempt to remedy the situation. An appointed representative who misses more than two-thirds (2/3) of the Board meetings within a fiscal year will no longer be considered an appointed representative on the Board. The Board will notify the respective member district that the seat will remain vacant until such time as the member district, by appropriate vote, ensures attendance of the appointed representative. When a seat becomes vacant, the member district shall automatically become an inactive appointed representative of the Board, shall not count towards a quorum, and shall not have voting rights on the Board, but shall continue to have all other rights and obligations of membership.~~

3. Each appointed representative must complete the training required by the Department of Elementary and Secondary Education (Department), as outlined in MGL c 40, § 4E and 603 CMR 50.05. Should an appointed representative fail to complete the required training within the timelines set in law and regulations, their member district, shall not count towards a quorum, and shall not have voting rights on the Board, but shall continue to have all other rights and obligations of membership. The member district's voting rights shall be reinstated once the appointed representative completes the training.

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Commented [GP(9): This doesn't read right. The district doesn't become an inactive appointed representative of the board. Maybe the district's representative will become an inactive appointed representative....

Commented [GP(10): Are you sure "rights" and

Commented [GP(11R10): OK

Commented [GP(12): We have provided replacement language in this paragraph.

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Commented [GP(13): Quorum and votes are defined by representatives, not member districts, so this should be reworked. Could say the member district's representative shall not count toward a quorum and shall not have voting rights.

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4. No appointed representative shall be eligible to serve in the positions of Executive Director, Treasurer, Business Manager or a person with responsibilities similar to those of a town accountant, or on the Board of Directors or as an officer or employee of any related for-profit or non-profit organization. No employee of the Collaborative may serve on the Board of ACCEPT (603 CMR 50.06 (2) (c)).
5. No appointed representative shall receive an additional salary or stipend for his/her service as a Board member.
6. Each member district will pay a yearly membership fee established by the Board in accordance with Section VII.

SECTION VI: POWERS AND DUTIES OF THE BOARD

The Board shall have all the powers and duties conferred and imposed upon Educational Collaborative boards by law and conferred and imposed upon it by this Agreement and such other additional powers and duties as are specified in MGL c. 40, §4E, 603 CMR 50.00 and any amendments thereof, or as may be specified in any other applicable general or special law.

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The Board is responsible for providing fiduciary and organizational oversight and accountability over the operation of the educational Collaborative including but not limited to what follows:

The Board shall:

- Be vested with the authority to enter into agreements with member and non-member districts or other Collaboratives to establish mutually beneficial programs and services or pricing arrangements.
- Ensure adherence to this Agreement and progress toward achieving the purpose and objectives set forth in the Agreement; determine the appropriateness and cost-effectiveness of any borrowing, loans or mortgages, consistent with Section VII C; approve all expenditures, including contracts, borrowing, and the purchase and sale of real estate; and ensure an annual report and independent financial audit for the previous fiscal year be completed annually and upon approval of the Board be submitted to the Commissioner and Chair of each member district no later than January 1 of each year.
- Ensure the audit report is completed annually and made available on the Collaborative's website and provided upon request.
- Ensure that the Collaborative makes the annual report available on the Collaborative's website and that the Collaborative must provide a printed hard copy of the most recent annual report to members of the public upon request.
- Establish policies to support the operation of ACCEPT, and shall, from time to time, review the policies for their effectiveness and appropriateness.
- Develop/ amend policies on personnel, students, finance and internal controls, and health and nursing.
- Determine the amount of cumulative surplus revenue that may be held by ACCEPT at the end of a fiscal year consistent with the requirements of law and Section VII E of this Agreement; how and under what conditions surplus funds may be returned to member districts or credited to support Collaborative programs and services offered to member districts.
- Appoint the Executive Director, Business Manager, and Treasurer and ensure there is segregation of duties among the Executive Director, Business Manager, and Treasurer. The Board will evaluate the Executive Director and Treasurer annually.

Commented [HR(15)]: You may want to consider adding something like...."considering regional needs and opportunities"
This is new language in the regulations. 50.04 3. d. 3

Commented [GP(16)]: Most of this is in prior bullet. Maybe combine this bullet and next - make audit and annual report available on website and upon request in hard copy

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○ **The Executive Director** shall serve under the general direction of the Board and have the day to day responsibility for all activities of the Collaborative, and shall be responsible for development and implementation and oversight of all of its programs. The Executive Director is responsible for recruitment, retention, supervision and discipline of personnel, with the exception of the Treasurer, and shall be responsible for implementing Board policies and procedures consistent with the policies of the Board. In addition, the Executive Director shall have the authority granted by MGL c40, §4E and any amendments thereto. The Executive Director shall maintain a website in accordance with MGL c 40 § 4E that shall include the list of appointed representatives serving on the Collaborative Board, copies of Board meeting minutes, a copy of the Collaborative Agreement and any amendments, a copy of the annual report and annual independent audit, and key contact information for the key educational Collaborative staff members. The Executive Director will give public notice of the date, time, location, and agenda items of all Board meetings in accordance with the MGL c 30A, §§ 18-25 pertaining to the open meetings of state governmental bodies. Detailed, accurate records of every meeting will be kept in accordance with the law pertaining to the open meetings and made available on the Collaborative website.

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○ **The Business Manager** shall be subject to MGL c 41, Sec 52 and have the powers and responsibilities, similar to those of a town accountant and consistent with 603 CMR 50.00 and the Board approved job description. The Business Manager may not be the Treasurer of the Collaborative. The Board shall ensure an annual evaluation of such employee's performance and effectiveness.

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○ **The Treasurer**, appointed by the Board, need not necessarily be a Treasurer of a member town, or regional school district. The Treasurer is authorized, subject to the direction of the Board, to receive and disburse all monies of the ACCEPT fund without further appropriation. At the discretion of the Board, the Treasurer may make appropriate investments of ACCEPT's funds when such funds are not immediately necessary for operations, consistent with MGL c 44, § 55B. The Treasurer shall manage all receipts and disbursements through the education collaborative fund. The Treasurer is also responsible for other tasks as determined by the Board and as stipulated in the Board approved job description, consistent with 603 CMR 50.00. No Collaborative employee or appointed representative to the Board may be the Treasurer. The Treasurer shall report directly to the Board. The Treasurer must give bond annually for the faithful performance of duties as Collaborative Treasurer in a form approved by the department of revenue and in a sum not less than the amount established by the Department as shall be fixed by the Board. The Collaborative Board of Directors shall annually evaluate the Treasurer's performance and effectiveness.

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Commented [GP(17)]: Does this need to be defined? Is it the same as the education collaborative fund mentioned later in the paragraph?

Found answer to my own first question - you should make a reference here to section VII B where it is defined

- Oversee the operation of the Collaborative to the end that the educational needs of students enrolled in Collaborative programs, as well as the goals of any cooperative program of the Collaborative, are met in an effective and economical way.
- Employ teachers, at least one registered nurse and other professional personnel, and shall enter into contracts for the services of persons who are necessary for the operation of ACCEPT programs and services.
- Ensure that the Collaborative shall annually prepare financial statements, including a statement of net assets (government-wide); statement of activities (government-wide); governmental funds balance sheet; governmental funds statement of revenues, expenditures, and changes in fund balance; general fund statement of revenues, expenditures and changes in fund balance, budget and actual; statement of fiduciary net assets; statement of changes in fiduciary fund net assets; and capital plan identifying current capital obligations or future planned capital projects.

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- Enter into contracts for the purchase of supplies and materials and for the leasing of land, buildings, and equipment as deemed necessary by the Board and which the Board has found to be cost-effective and in the best interests of ACCEPT, the member districts and consistent with Section VII C of this Agreement (Subject to MGL c 30B).
- Create, amend, and repeal all by-laws, policies, and rules for the management and operation of ACCEPT. The Board has all other powers and duties consistent with MGL c 40 §4E.
- Borrow money for any purpose consistent with the terms of this Agreement, including, but not limited to, to meet ongoing payroll obligations, to finance the purchase and/or lease of any real or personal property, including equipment, land, and/or a building(s) (including portables), and/or to finance any renovation, reconstruction and/or construction of any real property.

Commented [GP(18)]: Here it says leasing of land - above it says purchase and sale (second bullet)

Which is it or is it both? Please provide clarifying language.

No employee of the Collaborative may serve on the Board or shall be eligible to serve concurrently in the positions of Executive Director, Treasurer, or Business Manager or person with responsibilities similar to those of a town accountant.

SECTION VII: FINANCE

A. Financial Terms

1. Membership fees shall be assessed to each member district on July 1 of each year. Membership fees are to be used to offset the cost for administration and overhead. Each member district shall be charged membership dues based on a flat rate that offsets some of the administrative and overhead costs of the Collaborative determined annually by the Board as part of the budget process. Capital costs will be included in program fees and tuitions.
2. The remaining administrative costs of the Collaborative will be distributed across all programs operated by the Collaborative through an administration allocation expense proportionate to the operating budget for each program. The proportional share of administrative costs will be added to the operating budget of each program operated by the Collaborative.
3. The Board will set the fees, tuitions, and rates to be charged to districts for all Collaborative services annually based on the cost of providing the program or service. These include tuitions for specialized programs for students, hourly rates for therapy, evaluative, consultative, and the like services, and overhead calculations. Fees, tuitions, and rates will be calculated through the annual budgeting process for each program, including the administrative cost allocation noted in 2 above, with projections based on past usage.
4. Districts will be charged per unit of usage, e.g. per student enrolled, per hour of service delivery, per mile per student on transportation route, per participant enrolled in courses or workshops, or per district for multi-district initiatives. Each type of service may require a different schedule of billing, e.g. 3-4 times per year for program tuitions, per use for courses/PD, monthly for transportation, etc. Non-member districts will be charged a 20% surcharge on all services to help offset the cost of Collaborative operations.
5. The Board may enter into Agreements with member and non-member districts or other Collaboratives to establish mutually beneficial pricing arrangements.
6. The Collaborative Board may apply, by an appropriate majority vote, for state, federal, corporate, or foundation grants, and may enter into contracts to obtain the funds necessary to carry out the

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~~purpose for which the Collaborative was established; and the Board may~~ accept gifts, grants, or contributions from governmental and private sources, whether in cash or in kind.

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7. The Board may enter into contracts to obtain the funds necessary to carry out the purpose for which the Collaborative was established.
8. The Collaborative is subject to MGL c 30B for the procurement of goods and services. Procurement awards require Board approval.

B. Collaborative Fund

The Board shall establish and manage a fund to be known as the *ACCEPT Educational Collaborative Fund* (herein, "the ACCEPT fund"). The ACCEPT fund shall be the depository of all monies paid by the member districts and non-member districts and all grants, gifts, or contracts from the federal government, state government, charitable foundations, private corporations, or any other source; all such monies shall be paid directly to the Collaborative and deposited in the fund.

C. Borrowing

At public meetings of the Board, the Board may authorize the borrowing of funds or enter into short- or long-term agreements or mortgages to acquire or improve real property and/or equipment to support Collaborative operations. The Board shall investigate options related to borrowing, loans, and mortgages in order to determine that the terms are the most favorable available at the time of the application. Through a majority vote, the Board will determine that the terms related to borrowing, loans, or mortgages are cost-effective and are the most favorable available at the time of the application; and shall determine, through a majority vote, that the borrowing, loans, and mortgages are necessary to carry out the purposes for which the Collaborative is established, in the best interest of the collaborative and its member districts and consistent with the terms of the Collaborative Agreement.

In the event that such borrowing, loan or mortgage is for the acquisition or improvement of real property the Board shall provide notice to each member district within 30 calendar days of applying for real estate mortgages; and discuss its intent to apply for a real estate mortgage at a public meeting of the Board prior to the meeting of the Collaborative Board at which the final vote is taken; see 603 CMR 50.07(8).

D. Capital Reserve Fund

ACCEPT may create a capital reserve fund to support costs associated with the acquisition, maintenance, and/or improvement of fixed assets, including real property, pursuant to a capital plan. Funds in a capital reserve fund may be used only for the project or purpose for which the account was established. The establishment of a capital reserve shall be subject to the approval of two-thirds of the member districts. The request for approval must state the reason for the reserve and a limit on the balance that may be held in the reserve. Deposits into the capital reserve shall be proposed and approved through the budget process.

In the event that the purpose for which the capital reserve was created requires modification, the Collaborative Board shall revise its capital plan and provide notice to all member districts. If the member district does not vote to disapprove the revised capital plan within a 45-day period, that member district shall be deemed to have approved the revised capital plan. Two-thirds (2/3) approval of the member districts is required to revise the capital plan.

E. Surplus Funds

Unexpended general funds, as defined in 603 CMR 50.00, at the end of the fiscal year plus any previous year's surplus funds, as determined through the financial statements, will be considered cumulative surplus. The determination of cumulative surplus shall not include funds deposited in a capital reserve as

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provided for in 603 CMR 50.07(10), funds deposited in trust in accordance with MGL c 32B, § 20, and any amounts prepaid for tuition or services in accordance with MGL c 40, § 4E.

The Board will retain no more than 25 percent in cumulative surplus, in accordance with 603 CMR 50.03(5)(b) 10. On an annual basis, after the Board has discussed the audit results of the previous fiscal year, the Board shall approve, by majority vote, the final dollar amount of the cumulative surplus. The Board shall determine whether such final dollar amount of surplus funds is within the established 25 percent limit, and whether the funds will be retained by the Collaborative or whether all or some portion will be refunded to the member districts or credited to support programs and services offered to member districts by the Collaborative.

In the event an amount is to be refunded to the member districts, each member district share will be apportioned in accordance with the percentage of usage in the program/service area that generated the surplus for the previous fiscal year, as determined by the annual financial audit.

F. Annual Budget Preparation and Assessment of Costs

The Board shall annually determine the Collaborative budget consistent with the timelines, terms, and requirements in MGL c 40, § 4E and 603 CMR 50.00.

The Board shall identify the programs or services to be offered by Collaborative in the upcoming fiscal year and the corresponding costs. In the fall of each year, the Executive Director will consult with staff, look at trends and examine the prior year profit and loss statements to formulate and project expenses for the next fiscal year to run each program. The budget assumptions are based on the mission and core values of the Collaborative. The proposed budget shall contain all planned financial activity for all programs offered by the Collaborative for the upcoming fiscal year classified into line item categories. The line item projections include but are not limited to needed staff, supplies, rent, materials and equipment to run the program. Fees for service are determined by computing the expenses vs. the projected participation in each program for the next fiscal year. Forecasting of students that will be enrolled in special education and transportation programs in the next fiscal year is based on past history and ongoing discussions with key constituent leaders from member districts.

The projected budget and fee structure is presented to the Finance and Budget Subcommittee, a subset of the appointed representatives, for feedback and review prior to presentation to the full Board. The Board shall hold a public meeting on the proposed budget prior to its adoption and shall adopt the final budget by an affirmative majority vote at a subsequent meeting no earlier than ten (10) working days after the Board meeting at which the Collaborative budget was first proposed but **no later than March 30**, of the preceding fiscal year. The Treasurer shall certify and transmit the budget and the tuition rates, membership dues and fees-for-service for the upcoming fiscal year to each member district not later than June 30 of the preceding fiscal year. Adoption of the budget shall require a majority vote of the appointed representatives to the Board.

G. Budget Amendments

The Collaborative Board must approve all budget amendments including but not limited to those that decrease the budget and move funds across line items. Any amendment to the budget that results in an increase in the tuition rates, membership dues or fees for services shall adhere to the following procedures:

- a. All appointed representatives shall, within ten (10) working days of the public meeting at which the amendment was first proposed, report to their member districts the content of the proposed amendment

Commented [GP(19)]: This change is fine but why so early? For discussion.

Commented [GP(20R19)]: Discussed

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- b. The Board at a second public meeting of the Board next following the Board meeting at which the amendment was first proposed shall vote on all amendments; adoption shall require a majority vote
- c. The Treasurer shall certify and transmit the amended tuition rates, membership dues and fees for services to each member district not later than ten (10) working days following the affirmative vote of the Board

Commented [GP(21)]: This language seems unnecessarily complicated. How about: The Board shall vote on the amendment at the next public meeting after the meeting at which the amendment was first proposed.

Also , should it have to be at least X days after first vote, so all of the districts are informed (under a.)?

Commented [GP(22R21)]: 1st and 2nd readings?

H. Payment Terms

ACCEPT shall submit invoices to member and non-member districts for program tuitions on a quarterly basis. Fees for services to member and non-member districts will be billed on a monthly basis. Membership fees will be invoiced quarterly and paid within thirty (30) days of receipt of the ACCEPT invoice. Districts will pay for programs and services within thirty (30) days of receipt of ACCEPT's invoice.

I. Financial Accounting System

The Collaborative shall adopt and maintain a financial accounting system, in accordance with generally accepted accounting principles as prescribed by the governmental accounting standards board and any supplemental requirements prescribed jointly by the commissioner of elementary and secondary education and the commissioner of revenue, in consultation with the state auditor. At a minimum, the financial accounting system shall delineate: (a) administration and overhead; (b) rental of real property; (c) program costs; (d) capital expenditures, including fixed assets, real property or the improvement of real property; (e) debt payments; (f) deposits into a capital reserve; and (g) all additional disclosures required in 50.08(2).

SECTION VIII: PROCEDURE FOR AMENDING THE COLLABORATIVE AGREEMENT

Any member district, any appointed representative, or the Executive Director, may initiate a proposal for amendment of this Agreement. The proposed amendment shall be presented in writing to the Executive Director of the Board no less than ten (10) days prior to a meeting of the Board at which it shall first be read. The proposed amendment shall be read a second time at the regular meeting next subsequent to its first majority reading, at which time it may be approved by a two-thirds (2/3) vote of the Board. If approved by the Board, the proposed amendment shall then be submitted to member districts. If approved by a simple majority of member districts the proposed amendment shall be submitted for approval to the Board of Elementary and Secondary Education; following approval the proposed amendment shall become effective.

Commented [GP(23)]: What is a majority reading?

Commented [GP(24R23)]: Please clarify word choice

Commented [HR(25)]: We suggest that you include the following general language..."The collaborative agreement shall be amended from time to time, in accordance with the following procedures, MGL c 40, § 4E, 603 CMR 50.00 and Department guidelines..."

No amendment to this Agreement shall be effective until approved and authorized by a majority of the member districts and by the Board of Elementary and Secondary Education.

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SECTION IX: PROCEDURE FOR ADMITTING NEW MEMBER DISTRICTS

A new School Committee or Charter School Board may be added to ACCEPT consistent with approval of the Board and subsequent to amendment of the ACCEPT Collaborative Agreement, consistent with the provisions of Section VIII, MGL c 40, § 4E, and 603 CMR 50.03, and Department guidelines to reflect such membership. The applicant School Committee or Charter School Board shall apply in writing for admission to ACCEPT no later than December 31 of the fiscal year prior to the fiscal year in which the applicant School Committee or Charter School Board seeks membership. A School Committee or Charter School Board may be admitted to the Collaborative as of July 1st of any fiscal year provided that all required approvals, including that of the Board of Elementary and Secondary Education, are obtained by the preceding April 30th of the fiscal year prior to the fiscal year in which the new member School Committee or Charter School Board is to be admitted to the Collaborative. If the process for amendment

of the ACCEPT Agreement has not been finalized by April 30th, the new member district may appoint a non-voting representative to the ACCEPT Board. During the first year of membership, a newly admitted district will pay a 10% surcharge for all programs and services. During the second year of membership the surcharge will be reduced to 5%; in the following years member district rates will apply.

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Commented [HR(26)]: We are checking on this language.

Commented [GP(27R26)]: Clarify membership fees vs. surcharges

Commented [GP(28R26)]: Research.

SECTION X: PROCEDURE FOR WITHDRAWAL OF MEMBER DISTRICT

Any member district may withdraw from ACCEPT at the end of any fiscal year, provided that all necessary approvals have been obtained consistent with 603 CMR 50.00 et seq. subject to the following terms:

- A. At least 180 days prior to the end of the current fiscal year, the withdrawing member district shall provide written notice to every other member district that is party to this Agreement as well as to the Executive Director of the Collaborative and the Collaborative Board of intent to withdraw.
- B. Written notification of a member district's intent to withdraw from the Collaborative at the end of a fiscal year shall include the following:
 1. Notification addressed to the Chair of the Board and the Executive Director that the member district has voted to withdraw from the Collaborative with the effective date of withdrawal; and
 2. A copy of the minutes from the School Committee meeting in which the member district voted to withdraw from the Collaborative.
- C. Within thirty (30) days of notification of a member district's intent to withdraw from the Collaborative, an amendment shall be prepared to reflect changes in the Agreement caused as a result of the change in membership of the Collaborative.
- D. Upon a two-thirds (2/3) affirmative vote of the Board, the Collaborative Agreement will be amended to withdraw the exiting member district. The Collaborative Agreement shall be amended consistent with Section VIII of this Agreement. The withdrawal is not in effect until and unless the Board of Elementary and Secondary Education has approved the withdrawal by April 30th of the fiscal year in which the withdrawal is to occur.
- E. Upon withdrawal from the Collaborative, a former member district shall not be entitled to any assets or a portion of any assets of the ACCEPT Collaborative, including any surplus funds that may have been carried over from prior years and any capital reserve fund that may have been established by the Board.
- F. Any member district who has voluntarily withdrawn from the Collaborative will continue to be liable to the Collaborative for its share of any debts, claims, demands, or judgment incurred, including obligations for post-employment benefits incurred during the district's membership in the Collaborative, based on the member district's average per pupil enrollment in the Collaborative, in any Collaborative service, over the prior ten (10) fiscal years.
- G. A withdrawing member district will be charged a one-time exit fee, equal in amount to the annual membership fee established by the Board. This fee will be due prior to the end of the fiscal year that would mark the withdrawing district's final year as a member of the Collaborative.

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Commented [GP(29)]: 10 years prior to withdrawal

Commented [GP(30)]: Do you still want to keep this provision?

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H. Following the final audit of that fiscal year's financial records, the withdrawing district will be reimbursed any funds that remain on balance at the Collaborative as a result of prepayments to the Collaborative by the member district for tuition or services under MGL c 40, § 4E.

I. The withdrawal of any member district(s) at any time shall not affect the status of the Collaborative Agreement and the same shall remain in full force and effect until amended and approved by a 2/3 majority the Board and subsequently approved by a majority of the member districts and the Board of Elementary and Secondary Education.

J. Any School Committee or Charter School Board who has voluntarily withdrawn from the Collaborative may re-apply for admission to the Collaborative in accordance with Article IX of this Agreement.

Commented [GP(31)]: For discussion.

Commented [HR(32R31)]: Let's discuss.... "all procedures related to amending the agreement must be followed as stated in Section VIII of the Agreement, including the approval of the amended agreement by member districts and the Board of Education.

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SECTION XI: PROCEDURE FOR TERMINATION OF A MEMBER SCHOOL DISTRICT

The Board may vote to initiate the termination of the membership of any member district by a two-thirds (2/3) vote of the entire voting membership of the Board. The only reasons for such action shall be:

1. The non-payment of certain obligations such as the non-payment of fees or assessments owed to the Collaborative; or
2. Any other action that would seriously jeopardize the financial stability of the Collaborative.

Commented [GP(33)]: We do not believe the Board of Directors has this authority to do this.

Commented [GP(34R33)]: BOD may vote to recommend discussion with school committees the removal of a member

Procedure for such termination:

1. The Executive Director of the Collaborative, with the authorization of the chairperson of the Board, must provide written notice to the member district of the facts on which any possible termination action may be based. This notice must give the member district thirty (30) days to correct the situation.
2. The member district may work with the Executive Director and the Board Chair to develop a plan to address the situation.
3. If the member district does not correct the situation within thirty (30) days, then the Board shall schedule the vote to terminate that district's membership at the next Board meeting, which is scheduled sixty (60) days after the expiration of the thirty (30) day period referenced in Paragraph 1.
4. The Executive Director shall provide written notice to the chairperson of the member district school committee and to the superintendent of that member district of the date and time for the meeting at which the Board will consider initiation of termination of that member district's membership in the Collaborative. The notice will include a copy of the proposed amendment to this Agreement reflecting the termination of the member district. Such written notice shall be sent by certified mail or by overnight mail, both of which require acknowledgement of receipt of the written notice. In the written notice, the Board shall invite the member district to present any and all reasons why the Board should not terminate membership.
5. Whether or not the member district appears at the Board meeting at which the initiation of termination of membership is to be discussed, the Board shall vote on the motion to initiate the termination the member district's membership in the Collaborative and on the amendment to the Agreement reflecting such termination. In order to initiate the termination of the membership, the Board must vote by two-thirds majority to do so and an amendment shall be prepared in accordance with Section VIII and submitted to the member districts and to the Board of Elementary and Secondary Education for approval. Termination of the membership of the member district in ACCEPT shall not be effective until the

Commented [GP(35)]: Do you really want to do this? We need more information about this section.

Commented [GP(36R35)]: Is it to deal with financial issues? Couldn't you just say they don't get to use the services if they fail to meet certain requirements?

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Collaborative has fully complied with Article VIII of this Agreement, a majority of the member districts have approved the amendment and the Board of Elementary and Secondary Education has approved the amendment to the Agreement.

6. The effective date of a member district's termination from the Collaborative shall take effect on the next July 1 provided that the procedure outlined in paragraphs 1-5 has been completed by April 30.
7. Upon termination from the Collaborative, a former member district shall not be entitled to any assets or a portion of any assets of the ACCEPT Collaborative, including any surplus funds that may have been carried over from prior years and any capital reserve fund that may have been established by the Board.
8. Any member district of which membership has been terminated will continue to be liable to the Collaborative for its share of any debts, claims, demands, or judgment incurred, including obligations for post-employment benefits incurred during the district's membership in the Collaborative, based on the member district's average per pupil enrollment in the Collaborative, in any Collaborative service, over the prior ten (10) fiscal years.

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SECTION XII: TERMINATION OF THE COLLABORATIVE AGREEMENT

The Executive Director, any appointed representative of the Board, or a member district may propose the termination of the Collaborative by submitting such a proposal in writing to the Chairperson of the Board and, by giving notice to all other member districts and the Executive Director at least twelve (12) months before the end of the current fiscal year.

Commented [GP(37)]: This needs to be revised. It is not possible to achieve as written.

Commented [GP(38R37)]: Gives advanced notice

Within thirty (30) days of a request that the Board initiate termination proceedings, the Board shall discuss the request to terminate the Collaborative and determine next steps. The Collaborative may only be terminated at the end of any fiscal year (June 30) by a two-thirds (2/3) vote of the entire Board, subject to compliance with this section of this Agreement and compliance with the closing guidelines of the Department.

Commented [GP(39)]: Please remove this sentence.

Commented [GP(40R39)]: Add in accordance with statute, regulations and Department guidelines.

Should the Board secure a two-thirds (2/3) vote, to initiate termination proceedings, notice must be provided to all member districts within ten (10) working days of such vote. Any Board vote to terminate the Collaborative must be confirmed by a vote of two-thirds (2/3) of the member districts. Following the affirmative votes to terminate this Collaborative Agreement, the Executive Director shall inform the member and non-member districts who are served by the Collaborative and the Department in writing at least 180 days prior to the effective date of any termination along with the information required to be submitted to the Department pursuant to 603 CMR 50.11.

Prior to ACCEPT's termination, the ACCEPT Board shall arrange for a final fiscal audit of ACCEPT Collaborative. Such audit will be completed within ninety (90) days of the date of termination of ACCEPT. A copy of such audit report shall be sent to each member district and to the Department. Such audit must be completed before any assets (or liabilities) are disbursed.

By January 31 of the fiscal year in which the termination shall occur, the ACCEPT Board will:

1. Determine the appropriate disposition of the ACCEPT Collaborative funds, equipment and supplies
2. Determine the fair market value of all assets for the Collaborative, including, but not limited to, real estate, capital property, equipment and supplies owned by the Collaborative;
3. Determine the process for the appropriate disposition of federal/state funds.

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4. Identify the member district responsible for maintaining all fiscal, employee and program records.
5. Identify the member and non-member district(s) responsible for maintaining student records.
6. Determine the means of meeting all liabilities (debts and obligations) of the Collaborative, including obligations for post-employment benefits. All liabilities must be met before any monies are distributed to member districts.
7. Ensure the appropriate disposition of all assets of the Collaborative, including any unencumbered funds held by the Collaborative, and any capital property and real estate owned by the Collaborative. Unless the Board determines otherwise, all assets shall be sold and the monies shall be distributed to the member districts based on the member district's average per pupil enrollment in the Collaborative, in any Collaborative service, over the prior ten (10) fiscal years, ensuring fairness and equity for all members.
8. Determine the plans for member districts to address the needs of students that were being addressed by the Collaborative.

No part of the net earnings of the Collaborative shall inure to the benefit of any appointed representative, Executive Director, or any private individual (except that reasonable compensation may be paid for services rendered to or for the Collaborative by a private individual who is not a member, director or officer of the Collaborative), and no appointed representative or officer shall be entitled to share in the distribution of any of the assets upon dissolution of the Collaborative.

Following the affirmative vote of the member districts to terminate the Collaborative Agreement the Board shall notify the Department of the official termination date of the Collaborative, and shall submit the documentation required by 603 CMR 50.11 to the Department.

If the Collaborative receives a notice of intent to revoke approval of its Agreement, it shall immediately begin planning for termination of the Collaborative by providing notice to member districts and non-member districts and by following the procedures of 603 CMR 50.11.

~~XIII. GENERAL PROVISIONS~~

~~A. Waivers: Upon written request from a collaborative or member district, the Commissioner may waive the applicability of one or more provisions in 603 CMR 50.00, upon certification that the collaborative or member district has made a good faith effort to comply with said provisions or has presented a reasonable alternative to the commissioner. The waiver request shall include sufficient documentation to support the need for relief. Waivers of 603 CMR 50.00 shall be considered only under circumstances the Commissioner deems exceptional and shall be granted only to the extent allowed by law.~~

~~B. State Ethics Law: The Collaborative Board Members and all Collaborative employees shall be public employees subject to M.G.L.c.268A.~~

~~C. Related Organizations:~~

- ~~1. No appointed representative shall serve on the Board of Directors or as an officer or employee of a related for-profit or non-profit organization.~~

Commented [GP(41)]: What made you decide to include this? It is directly from 603 CMR 50 and therefore not necessary for you to copy it here.

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- ~~2. The Executive Director, Treasurer, and Business Manager shall not serve as a Board Member, Officer, or employee of any related for profit or non-profit organization.~~
- ~~3. No Collaborative employee shall be employed at any related for profit or non-profit organization.~~

~~Severability: If any section or portion of a section or 603 CMR 50.00, or the applicability of 603 CMR 50.00 to any person, entity, or circumstance is held invalid by a court, the remainder of 603 CMR 50.00 and/or the applicability of such provisions to other persons, entities or circumstances shall not be affected thereby.~~

SECTION ~~XIV~~: INDEMNIFICATION

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Neither the Executive Director nor any member of the Board shall be liable to the Collaborative or to any member district hereof for any act or omission of the Executive Director or any member of the Board or be held personally liable in connection with the affairs of the Collaborative except only liability arising out of his own willful misfeasance, bad faith, gross negligence or reckless disregard of duty to the Collaborative or its member districts.

Neither the Executive Director nor any member of the Board shall be personally liable for any debt, claim, demand, judgment, decree, liability or obligation of any kind of, against, or with respect to the Collaborative or arising out of any action taken or omitted for or on behalf of the Collaborative and the Collaborative shall be solely liable therefore and resort shall be had exclusively to the Collaborative property for the payment or performance thereof and each member of the Board and any Executive Director shall be entitled to full indemnity and full reimbursement out of Collaborative property, including, without limitation, fees and disbursements of counsel, if, contrary to the provisions hereof, such Board member or Executive Director shall be held personally liable. Any person dealing with the Collaborative shall be informed of the indemnification contained herein and, where the Board deems it appropriate, documents or instruments executed by or by authority of the Board shall contain reference hereto.

The Executive Director and his/her legal representatives and each Board member and his/her legal representatives shall be indemnified by the Collaborative against all liabilities and expenses, exclusive of amounts paid to the Collaborative, including judgments, fines, penalties, amounts paid in settlement and counsel fees, incurred in reasonable settlement of any action, suit or proceeding to which such member of the Board or Executive Officer or his/its legal representatives may be made a party or otherwise involved by reason of his/its capacity as member of the Board or Executive Officer, except only liabilities and expenses arising out of his/its own willful misfeasance, bad faith, gross negligence or reckless disregard of duty to the Collaborative as final adjudged in such action or, in the event of settlement or termination of such action without final adjudication, as determined by independent counsel for the Collaborative. Said right of indemnification shall be in addition to any other rights to which such member of the Board or Executive Officer may be entitled as a matter of law or which may be lawfully granted to him/it.

The costs of such liabilities or expenses which are not borne by the ACCEPT's insurance carriers shall be apportioned among, assessed to and paid by the member districts that were members of ACCEPT at the time of the occurrences giving rise to the liability or expenses, whether or not any such member district has thereafter withdrawn from ACCEPT, in accordance with the provisions concerning the apportionment, assessment and payment of operating costs applicable at the time of the occurrences giving rise to the liability or expense.

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SECTION ~~XV~~: COMPLIANCE WITH SECTION 501(c)(3)

Notwithstanding any other provision of these articles, the ACCEPT Education Collaborative, while a public entity, is organized exclusively for educational purposes, as specified in Section 501(c) (3) of the Internal Revenue Code, and shall not carry on any activities not permitted to be carried on by any entity exempt from Federal income tax under Section 501 (c) (3) of the Internal Revenue Code.

No substantial part of the activities of the Collaborative shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Collaborative shall not participate in or intervene in (including the publication or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

SECTION ~~XVI~~: NON-DISCRIMINATION

The ACCEPT Education Collaborative does not discriminate on the basis of race, color, sex, gender identity, religion, national origin, disability or sexual orientation and ensures that all students have equal rights of access and equal enjoyment of the opportunities, advantages, privileges and courses of study. The Board's policy of nondiscrimination will extend to students, staff, the general public, and individuals with whom it does business.

The ACCEPT Education Collaborative is an Equal Opportunity Employer.

This Agreement shall take effect on the date of approval by the Board of Elementary and Secondary Education and shall continue indefinitely. This Agreement has been approved by duly authorized votes at public meetings held by the individual School Committees and Charter School Boards whose Chairpersons have signed below.

Date of first reading: _____

Date of second reading: _____

Date approved by Collaborative Board of Directors: _____

Signatures and Dates approved by member School Committees/Charter School Boards:

Chairperson, School Committee of Town of Ashland Date of Vote

Chairperson, School Committee of Town of Dover Date of Vote

Chairperson, School Committee of Dover/Sherborn
Regional School District Date of Vote

Effective 07/01/2024

Commented [GP(42)]: For discussion

Commented [HR(43R42)]: "Notwithstanding any other provision of these articles, the Collaborative is organized exclusively for education purposes, as specified in Section 501(c) (3) of the Internal Revenue Code, and shall not carry on any activities not permitted to be carried on by an entity exempt from Federal Income tax under Section 501 (c) (3) of the Internal Revenue Code. No substantial part of the activities of the Collaborative shall be the carrying on of propaganda, or otherwise attempting to influence legislation, or participating in, or intervening in (including the publication or distribution of statements), any political campaign on behalf of any candidate for public office. The focus of READS Collaborative is to provide quality services that improve the lives and futures of children with disabilities as a collaboration with Member Districts."

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Chairperson, School Committee of Town of Framingham

Date of Vote

Chairperson, School Committee of Town of Franklin

Date of Vote

Chairperson, School Committee of Town of Holliston

Date of Vote

Chairperson, School Committee of Town of Hopkinton

Date of Vote

Chairperson, School Committee of Town of Medfield

Date of Vote

Chairperson, School Committee of Town of Medway

Date of Vote

Chairperson, School Committee of Town of Millis

Date of Vote

Chairperson, School Committee of Town of Natick

Date of Vote

Chairperson, School Committee of Town of Needham

Date of Vote

Chairperson, School Committee of South Middlesex Regional
Vocational Technical School District

Date of Vote

Chairperson, School Committee of Town of Sudbury

Date of Vote

Chairperson, School Committee of Town of Sherborn

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Chairperson, School Committee of Town of Wellesley

Date of Vote

Chairperson, School Committee of Town of ~~Wellesley~~ Westborough

Date of Vote

Commented [GP(44)]: This should be Westborough, right?

Approved on behalf of the Board of Elementary and Secondary Education, by the Commissioner of
Elementary and Secondary Education:

Jeffrey C. Riley, Commissioner

Effective Date

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Effective 07/01/2024

ITEM TITLE: Approval of Field Trip to Washington D. C. for the NHS Music Department for 2025.

DATE:

ITEM TYPE:

ITEM SUMMARY: LINK - Field Trip to Washington DC

BACKGROUND INFORMATION:

RECOMMENDATION:

ATTACHMENTS:

Description	File Name	Type
approval of field trip to washington dc for the music depart at NHS for 2025	washington_dc_field_trip_for_3.18_sc_mtg.pdf	Cover Memo

**School Sponsored
Field Trip Request Form
Out of State Travel ONLY**

Attach itinerary, student lists (if known), hotel information, chaperone sign-off forms, waiver requests, etc. to the completed request form and send to the Principal's office. If you will just be submitting the one request form, you may return it by email.

Submit to the principal's office no later than the Wednesday before the Natick High School Committee is to meet. Overseas trip requests must be submitted and also approved in advance of any marketing to the students.

The lead teacher or an adult representative from your trip must appear at the School Committee meeting to present the request. You will be notified of the date of this meeting.

To: Dr. Bella Wong, Interim Superintendent

From Josepha Blocker, NHS Principal

Date: 3/12/24

Re: Field Trip Approval

I would like to request School Committee Approval for the following overnight / out-of state trip:

Lead teacher's name: Morrill Burns

Group: NHS music department

Destination and also Itinerary: Washington, D.C.

Date of trip: May 22-26, 2025

Time & location of departure & return: TBD, NHS

Transportation: bus

Mode of transportation requested: bus

Method of payment (fundraising, etc.): family pay

Names & phone numbers of chaperones: (508) 451-9018 - Morrill, (860) 906-8177 Burns

Estimated Cost of trip per student: \$1500-2000

Please state the purpose of the this trip: music department performances,

I support this request and thank you for your consideration. clinics, work with military music ensembles, tourism in nation's capital

Sincerely,



Josepha Blocker
Principal

☒ I have attached all relevant forms necessary to submit this request.

Natick High School

Chaperone Information Form

Overnight & Out of State Field Trips

This form must be completed in advance and attached to the Out of State Travel / Overnight Form as you submit your request for travel to the principal. All chaperones traveling on any Natick High School trip must sign this form. Requests for travel will not be sent to School Committee without these forms attached.

Trip Lead Chaperone: Kate Burns
Trip destination and travel dates: 6/22 - 6/26
Chaperone name: Kate Burns (860) 906-8177

Faculty chaperone: ☒

Adult chaperone: ☐

Contact information

(Phone number and contact person in event of an emergency)

Den Leslie (860) 836-7980

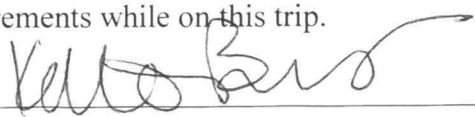
CORI Check complete (if non staff chaperone): ☐

Chaperone Sign-off

(All chaperones must sign off prior to departure)

Natick Public Schools requires that all chaperones on school sponsored trips be available to students for the duration of the trip and 24 hours a day. Chaperones will act as guardians and make all decisions for the benefit and safety of the students throughout the trip. Natick Public Schools does not permit any member of any Natick High School trip to consume alcohol or use any non-prescription drugs while on any school-sponsored field trip.

☒ I have read and understand the Natick Public Schools chaperone sign-off and I agree to abide by these requirements while on this trip.

Chaperone signature: 

Each chaperone must sign this sheet and all sheets must be attached to the initial request for travel made to the principal.

Natick High School

Chaperone Information Form

Overnight & Out of State Field Trips

This form must be completed in advance and attached to the Out of State Travel / Overnight Form as you submit your request for travel to the principal. All chaperones traveling on any Natick High School trip must sign this form. Requests for travel will not be sent to School Committee without these forms attached.

Trip Lead Chaperone: **Scott Morrill**

Trip destination and travel dates: **5/22 - 5/26**

Chaperone name: **Scott Morrill**

Faculty chaperone: ☒

Adult chaperone: ☐

Contact information
(Phone number and contact person in event of an emergency)

Erin Morrill (spouse): (508) 654-1850

CORI Check complete (if non staff chaperone): ☐

Chaperone Sign-off

(All chaperones must sign off prior to departure)

Natick Public Schools requires that all chaperones on school sponsored trips be available to students for the duration of the trip and 24 hours a day. Chaperones will act as guardians and make all decisions for the benefit and safety of the students throughout the trip. Natick Public Schools does not permit any member of any Natick High School trip to consume alcohol or use any non-prescription drugs while on any school-sponsored field trip.

☒ I have read and understand the Natick Public Schools chaperone sign-off and I agree to abide by these requirements while on this trip.

Chaperone signature: 

Each chaperone must sign this sheet and all sheets must be attached to the initial request for travel made to the principal.

Revised June, 2022

Departure would
be post-Grad rehearsal
on Thursday, May 22!

Kate Burns

Group Leader
Scott Morrill

Group Leader ID
343291



Natick High School Tour of DC

Natick High School Band, Orchestra, Choir

INCLUDED FEATURES

- Services of a Professional Tour Manager Throughout your Travel Program
- All Sightseeing and Entrances as Listed in the Itinerary
- Basic Gratuities for Tour Manager and Bus Driver
- Concert Arrangements Including Venue Rental, Concert Permits, Advertisement and On-site Assistance
- Direct Billing to Participants
- Group- and Repertoire-Appropriate Venue to Include Pre-Concert Rehearsal Time, Where Possible
- Guaranteed Audiences
- Liability Coverage Protection in Excess of \$50,000,000
- Private Deluxe Air-Conditioned Motor Coach

TRIP ITINERARY

Depart From: No Flights

5 Days | Overnights: Washington, DC (4)

DAY 1, MAY 22, 2025: WASHINGTON, DC

Welcome to the Nation's Capital! After meeting your Encore Tour Manager, explore the Smithsonian Museum of Natural History. Have time for lunch on your own at the Ronald Reagan Building. This afternoon have a rehearsal at the hotel. Enjoy dinner together, followed by an evening tour of the illuminated monuments of FDR, MLK and Thomas Jefferson Memorials. (D)

DAY 2, MAY 23, 2025: WASHINGTON, DC

This morning, participate in a masterclass with the Marine Band (under group's own arrangements). Have time for lunch on your own. This afternoon, you'll have a performance at the Armed Forces Retirement Home (pending approval). Tonight, enjoy dinner and a comedy show! (B,D)

DAY 3, MAY 24, 2025: WASHINGTON, DC

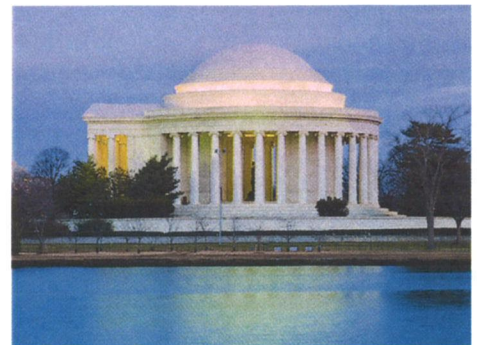
Take a guided tour of Washington's memorials and historic places including the Lincoln Memorial, WWII Memorial, Korean War Memorial and the Vietnam Veterans Wall. You'll have a group White House photo opportunity followed by time for lunch on your own. Today's highlight will be your participation in a workshop run by a local clinician. Tonight, have a dinner and bowling night! (B,D)

DAY 4, MAY 25, 2025: WASHINGTON, DC

Visit Arlington Cemetery where you will see the changing of the guard at the Tomb of the Unknown Soldier, Arlington House and the Kennedy Eternal Flame. Have time for lunch on your own at the Pentagon City Mall. Then perform in front of the WWII Memorial. Tonight celebrate your trip to DC with a DJ and Dinner cruise along the Potomac River! (B,D)

DAY 5, MAY 26, 2025: DEPARTURE

Breakfast at hotel then visit the Holocaust Museum. Have time for lunch on your own then visit the National Archives where you will see the Declaration of Independence, the Bill of Rights and the U.S. Constitution! Then board your coach for your return trip home. (B)



TOUR COST

Cost per Traveler

\$148 per month using an automatic payment plan

Full Payment Deadline

2/1/2025



ENCORE TRIPSITE

Scan the code to view your group's Tripsite and learn more details about your upcoming trip, and to register!

Cost Breakdown

Program Fee

\$

Total Cost

Valid through

Additional Fees (as applicable)

Single Room Supplement

\$440

Double Room Supplement

\$240

Ultimate-Plus Protection Plan

\$125

NOTES FROM ENCORE

Save \$50 off your Total Participant Fees if you pay for your trip through E-Check or our Automatic Payments Plan

All registered participants can enjoy the convenience, security, and savings of having payments automatically withdrawn from a checking account by enrolling in an Automatic Payment Plan. To learn more, visit encoretours.com/automatic-payments

Get Started Today

ONLINE:

Scan the above QR code or visit www.acis.com/findmytrip and enter your Group Leader's ID and last name and click Register Now when you're ready to sign up.

MAIL:

If you prefer, send your completed registration form to:
Encore Performance Tours
330 Congress Street, Suite 5
Boston, MA 02210

QUESTIONS?

Contact Traveler Support via:
Live Chat on encoretours.com or
Email accounts@encoretours.com

Presenting your custom designed proposal:

Natick HS Music Department

of

Natick, Massachusetts

Mr. Scott Morrill, Band Director

Your proposed trip is to:

WASHINGTON D.C.

Including these trip highlights:

National Mall Performance

National Monuments

Arlington Cemetery

Armed Forces Retirement Home Performance

Proposed trip date:

May 22 - 26, 2025

Presented by:

Kenzie Fouts

Travel Designer

kenzie.fouts@musictravel.com



www.musictravel.com



Natick HS Music Department

Natick, MA

May 22 - 26, 2025

Thursday, May 22

Travel to D.C.

Meet at the School

Pack or eat breakfast before arriving.

Depart for D.C.

Lunch stop en Route (\$20)

Fast food lunch stop en route, \$20 budget.

Arrive in D.C.

Hotel Check- In

Pizza Party

Pizza dinner served with free time at your hotel this evening.

Band Rehearsal

Renting hotel space for a band rehearsal this afternoon.

Friday, May 23

National Monuments

Breakfast at Hotel

Breakfast at your hotel this morning.

Depart Hotel

United States Marine Band

Open rehearsal, arranged by client.

Lunch at Museum Café

We are located adjacent to the US Holocaust Memorial Museum. When exiting the museum facing Raoul Wallenberg Place, cross the plaza and enter the building to your right to find the Cafe.

The menu includes soups, salads, sandwiches, snacks, beverages, and more.

Holocaust Memorial Museum

This museum tells the story of the Holocaust in its three-floor permanent exhibition. Highlights include the Tower of Faces, an actual barracks building from Auschwitz, a rare documentary film and the Hall of Remembrance.

Depart Museum

Hard rock Café Dinner

Since its 1971 opening in London, Hard Rock Cafe has become a global phenomenon. With 100 restaurants all over the planet, this popular eatery features great rock memorabilia, music and food in a high-energy setting.

Saturday, May 24

Performances

Breakfast at Hotel

Breakfast at your hotel this morning.

Armed Forces Retirement Home

Performance for the residents of the armed forces retirement home veterans.

Lunch at Carmine's

Carmine's serves every meal like it was an Italian American wedding feast – huge portions of antipasti, pastas, and entrees on large platters for sharing. \ Opened in 1990, the Italian restaurant has the look and feel of a place that has been around for much longer.

National Mall Performance

Location and Time TBD.

Acceptance is required via a special park permit.

Smithsonian Museum Free Time

More than 30 million items are on display including the first airplane, first space ship to the moon and the world-renowned Hope Diamond. Visit as many of the Institution's museums as time allows.

Meet to Depart

Board Dinner Cruise

Our Washington, DC Signature Dinner Cruise is an unforgettable experience. Dine and dance on the Potomac River with views of the city's magnificent skyline on this casual day out. Enjoy a delicious, chef-prepared buffet and gorgeous views of Washington, DC's spectacular architecture. You'll marvel at famed city landmarks, such as the Washington Monument and National Harbor, from our cozy, climate-controlled interior, and open air-roof decks. Join us for a memorable, one-of-a-kind day.

End of Cruise

Sunday, May 25

Arlington Cemetary

Breakfast at Hotel

Breakfast provided at your hotel this morning.

Depart for Arlington

Arlington Cemetery

Officially designated as a military cemetery in 1864, Arlington Cemetery is the resting place for more than 260,000 people. Veterans from the American Revolution through the Persian Gulf War, Somalia, Iraq and Afghanistan are buried here. Pre-Civil War dead were re-interred after 1900. Savor the majesty of this revered burial ground as you visit some of the well-known gravesites, the Tomb of the Unknown Soldier and see the impressive Changing of the Guard.

[Changing of the Guard](#)

This impressive event begins as the Commander of the Relief inspects the uniform and weapon of the next guard to walk the post at the Tomb of the Unknown Soldier. Orders are passed from the outgoing guard to the incoming, and salutes are rendered. Observers are asked to remain silent and standing during this solemn ceremony.

[Travel back to D.C.](#)

[Box'd Lunch](#)

Boxed lunch on the way to Arlington.

[Show at Kennedy Center](#)

Show is TBD.

[Dinner at Ben's Chili Bowl](#)

[Moonlight Monument Tour](#)

2 1/2 hours long. *Tour length times may vary depending upon road conditions or traffic.

*****Washington Monument

*****WWII Memorial

*****MLK Memorial

****Korean War Memorial

***Lincoln Memorial

**Vietnam Memorial

*White House

Interior not included.

[End of Tour](#)

Monday, May 26

[Travel Home](#)

[Breakfast at Hotel](#)

Breakfast provided at your hotel this morning.

[Hotel Check - Out](#)

[Depart Hotel](#)

[Lunch en Route \(\\$20\)](#)

Fast food stop en route, \$20 budget.

[Arrive back at School](#)

TOUR CONDITIONS

Natick HS Music Department

Natick, Massachusetts
to:

Washington D.C.

National Mall Performance

National Monuments

Arlington Cemetery

Armed Forces Retirement Home Performance

May 22 - 26, 2025

Trip Price per Person

3 Complimentary Trips Included. 161-174 passengers not priced.

Passengers	200	150	160	175
Quad	\$1465	\$1518	\$1474	\$1558
Triple	\$1565	\$1618	\$1574	\$1658
Twin	\$1764	\$1817	\$1773	\$1858
Single	\$2363	\$2416	\$2371	\$2456

IMPORTANT NOTE: The above trip prices are based on hotel room occupancy and the total number of travelers and may vary depending on group size when prorated costs, such as motor coach, etc., are affected. Tour prices in this proposal are based on tariffs in effect as of February 15, 2024 and are subject to change. These trip prices were developed for individuals traveling with your group, as a group, on the trip described in this proposed itinerary.

Inclusions

- Music Travel Consultants tour director throughout
- Roundtrip Motorcoach Transportation via chartered coaches
- Tolls, Taxes and Daily Maintenance Fees for Driver(s)
- (4) nights Hotel Accommodations per the itinerary
- (13) Meals included; they will be a variety of buffet, fast food, plated and/or pre-selected menus per the itinerary. For variety and convenience, money will occasionally be given in lieu of a pre-determined restaurant.
- All Sightseeing & Special Events per the Itinerary
- Entrance Fees where necessary
- Taxes and Gratuities - As required for all included features
- Gratuities to Driver(s) and Local Guide(s) as necessary
- Trip Departure Briefing (if applicable)
- Customized Tour Itinerary & Baggage Tags
- All Operations & Planning Charges

Exclusions

Passport fees; baggage handling at airports & hotels; excess baggage charges; forwarding of baggage; items or services of a personal nature such as snacks, laundry, room service, telephone calls, pay TV, movies, cables, souvenirs or the like; gratuities to travel directors; any items or services not mentioned specifically in tour conditions.

Payment Schedule

Payment	Amount	Due Date
Non-refundable deposit	\$100.00	March 1, 2024
Installment	\$200.00	May 1, 2024
Installment	\$200.00	July 1, 2024
Installment	\$200.00	September 1, 2024
Installment	\$200.00	November 1, 2024
Installment	\$200.00	January 1, 2025
Installment	\$200.00	March 1, 2025
Final Payment	Balance	May 1, 2025

Cancellation Information

"Cancellation" is defined as any change made to the passenger list at least 60 days prior to trip departure day. Cancellation must be made under the traveler's account at MTC® Online by clicking on the "Cancel a Traveler" link on traveler's/ payer's welcome page dashboard OR by e-mail or written communication to MTC®. With the exception of non-refundable deposits/payments, if cancellation is received 60 days or more prior to trip departure day, money returned by suppliers is refundable. Cancellations received 60 days or fewer before, or on, trip departure day are non-refundable, unless a paying substitute traveler takes the place of the cancelled person. If the trip includes airfare, cancellation and/or substitution policies may vary, depending on the airline, date of ticketing and group contract. Please contact MTC® for additional information. Travelers desiring travel and cancellation insurance may find it from a provider of their choice.

Tour Operator Responsibility

MTC® acts only as an agent in providing means of transportation or other services. All tickets are issued and all other services are offered or provided subject to any and all terms and conditions, under which such means of transportation or other services are offered or provided. The issuance and acceptance of such services shall be deemed to be consent to the further condition that MTC® shall not be or become liable or responsible in any way in connection with such means of transportation or in connection with other services, or for any loss, injury or damage to or in respect of any person or property howsoever caused or arising, even if such loss, injury or damage arises, in whole or in part, as a result of alleged negligent acts or omissions of Music Travel Consultants. The airlines, trains, motor coaches and ships concerned are not to be held responsible for any act, omission or event during the time passengers are not aboard the airline, train, motor coach or ship. MTC® reserves the right to alter the itinerary. Any extra charges arising from such change must be met by the passenger. MTC® reserves the right to cancel the tour or to remove any passenger from the tour; its sole liability in such instance being the refund of all monies paid to it for unused services. By acceptance of tour membership, Passenger agrees to the foregoing and also agrees that MTC® shall not become liable or responsible for loss, damage, injury or inconvenience to Passenger and to their possessions caused by or resulting from occurrences, negligent or otherwise, due to the malfunction or breakdown of machinery or equipment, strikes or labor disputes, acts of God, war or civil strife, acts of governments or civil authorities, disease, delays, fire, theft, weather, itinerary changes or cancellation of services or default by suppliers, even if such loss, injury or damage arises, in whole or in part, as a result of alleged negligent acts or omissions of Music Travel Consultants LLC.

Why Travel With Music Travel Consultants?

Founded in 1987 by music advocates, Music Travel Consultants specializes exclusively in student group travel arrangements for middle school, high school and collegiate bands, choirs, and orchestras. Now led by award-winning music teachers, we focus on meeting the needs and exceeding the expectations of students, teaching staff, parents and administrators in each group we serve. High quality trips and extraordinary personal service are the hallmarks upon which we've built our reputation. Our staff takes the time to understand your needs and concerns. MUSIC GROUP TRAVEL is OUR business. We know MUSIC...musicians, music educators, music directors and arts advocates comprise our experience in every popular music group destination on the globe. Our commitment is to give your group an educational and once in a lifetime travel experience. Learn more about MTC here:

www.musictravel.com/introduction

The Travel App

A travel app for the finest bands, choirs and orchestras in the world.

Music Travel Consultants introduces the "Travel" app, free to all of a group's travelers. Music directors, staff, chaperones and students may use this secure, information-packed, versatile app during their trip. With real-time trip schedule updates so everyone knows where to go and when to be there. The app also provides instantaneous group messaging because communication is key to a successful trip and invaluable in an emergency. Travelers can use the app to securely send messages and photos limited only to their group. The "Travel" app is full of music director tools, which easily record contacts, create lists of all kinds and assign chaperones. To stay organized, assistants, staff and boosters may be granted access at the music director's discretion. The "Travel" app frees a music director's time, and provides staff, chaperones, students and travelers a convenient, easy, secure way to totally enjoy the trip and all it offers! You can find out more about the "Travel" app at:

www.tripaccount.com/app



Dedicated Tour Directors

One of the integral parts of a successful Music Travel Consultants trip is having a dedicated and committed Tour Director, right at your side throughout your journey. From a group's first steps out the door until they return safely home, if the unpredictable happens, rest assured that your MTC Tour Director will use extensive training and management skills to find a solution as quickly as possible. Want to know more about the importance of

www.musictravel.com/mtc-tour-directors.html

References? We've Got a Few...

Alton High School Band - IL
Ayala High School Band - CA
Ben Davis High School Band, Choir & Orchestra - IN
Park Vista High School Band - FL
Colony High School Band - AK
Dobyns-Bennett High School Band - TN
Brecksville Broadview Heights Choir & Orchestra - OH
Fair Lawn High School Band - NJ
Homestead High School Band - CA
Penn High School Band, Choir & Orchestra - IN

Keller High School Band - TX
Lafayette High School Band - LA
Miamisburg High School Band - OH
Eden Prairie High School Band - MN
Greenwood High School Band - IN
Perrysburg High School Band - OH
Avon High School Music Dept - IN
Bands of America Honor Band - USA
Blue Springs High School Band - MO
Palo Verde High School Band - NV

Carmel High School Music - IN
Chattahoochee High School Band - GA
Concord High School Music - IN
Center Grove High School Band - IN
BASIS Independent Band & Choir - NY
James Bowie High School Band choir - TX
Kennesaw Mountain High School Band - GA
Mililani High School Band - HI
Plymouth-Canton High School Band - IN
Louisville Male High School Band - KY

THE TRAVEL FAMILY



Since 1987, Music Travel Consultants, led by accomplished band directors, has become first choice for student performing group travel by hearing customers, providing industry-leading on-line services and having professional Tour Directors conduct most trips. Focused on creating custom trips that provide relevant, memorable and rewarding student travel experiences, Indianapolis-based Music Travel successfully partners with customers to do just that, in destinations within the United States and world-wide. Over 165 years combined travel expertise earned in over 68 countries enables Music Travel Consultants to anticipate group needs and deliver group wishes, without surprises or hidden costs.

www.musictravel.com



In today's world, nothing is more important than our children's education. To strengthen educational values, learning must be experienced in person. With over a century of "in the classroom" and "out in the world" teaching experience, Educational Destinations is supremely equipped to connect students to the world. And your students' educational process is enhanced through trips created by accomplished educators and by a travel team that is at your side from the planning process to the end of the trip. ED will help you gain support and approval for plans at all levels, from administrators to parents to the focus of the trip, the students. Our solutions reduce liability for both school and trip organizer, and our curriculum aids smooth the planning process and free up your time for what is truly important: Teaching.

www.educationaldestinations.com

APPOINTMENTS

We are pleased to be members of the following prestigious and respected travel associations in an ongoing effort to provide the absolute best student group travel service possible.

Music Travel Consultants is proud to be a Disney Parks Recognized Youth Travel Planner. Music Travel Consultants was also selected to be a part of the Walt Disney World Resort/Disneyland Resort Youth Travel Planner Symposium.



Music Travel Consultants is pleased to be Disney Broadway's Preferred Travel Planner. Disney Theatrical Productions Limited (DTP), also known as Disney on Broadway, is the flagship stageplay and musical production company of the Disney Theatrical Group, a subsidiary of The Walt Disney Studios, a major business unit of The Walt Disney Company.

Music Travel Consultants is proud to be an official Universal Orlando Preferred Youth Travel Planner. Universal Orlando Resort™ is proud to partner with select vendors that provide superior service and quality products for the ultimate theme park and resort hotel experience.



Music Travel Consultants is pleased to be the Official Student Travel Partner of Music for All and Bands of America. Music for All is one of the largest and most influential national music education organizations in support of active music-making. Music for All is unique in that it combines programming at a national level with awareness campaigns, research and advocacy. Bands of America, the nation's leading presenter of music events for high school band students, champions a mission to create and provide "positively life-changing" experiences for students, teachers, parents and communities.

Music Travel Consultants is proud to be Winter Guard International's Preferred Travel Partner. WGI Sport of the Arts is the world's premier organization producing



indoor color guard, percussion, and winds competitions. As a non-profit youth organization, WGI also serves as the governing body for the indoor color guard, percussion, and winds activities. It is called the Sport of the Arts because it brings music to life through performance in a competitive format. Even with over 40 years of history, the sport continues to evolve and grow.

MEMBERSHIPS

Providing students with educational and unforgettable experiences is an effort that goes beyond Music Travel Consultants. We are surrounded by world-class programs and partners that support our vision and we support each other the same way musicians do. Here are some additional organizations we are proud to be a part of:



Proud Corporate Member



LETTER OF INTENT

Music Travel Consultants
5348 Vermont Street, Suite 200
Indianapolis, IN 46224
Phone: 317.637.0837
www.musictravel.com



This Letter of Intent appoints **Music Travel Consultants** as the sole agent for all transportation, sleeping arrangements, food functions, entertainments activities, and tour arrangements in connection with the tour proposal for **Natick High School Music Department, May 22 - May 26, 2025, to Washington D.C.** dated **January 10, 2024**. All services outlined in that itinerary and tour conditions become part of this agreement.

Natick High School Music Department agrees to timely compliance with the payment schedule as outlined in the proposal, and further warrants that it will promote the trip to its membership so as to achieve the level of tour member participation specified in the tour proposal. It warrants that it understands that the tour pricing is based on the number of participants stated in the proposal, and it understands that the prices may change up or down with decreases or increases in the number of participants.

In the event that the proposed services cannot be provided due to cancellation or unavailability of said services, **Music Travel Consultants** reserves the right to make substitutions of features of equal value and similar quality, per its Tour Operator's Responsibility clause, printed below.

Tour prices are based on a specifically proposed number of tour participants, in conjunction with tariffs in effect as of **January 10, 2024**, and they are subject to change. (See TOUR CONDITIONS page of proposal)

Written cancellations by individual tour members are refundable under the criteria set-forth in the paragraph entitled CANCELLATION INFORMATION on the proposal's TOUR CONDITIONS page.

Music Travel Consultants is insured and abides by the standards of business conduct of National Tour Association (NTA) and Student & Youth Travel Association (SYTA). Personal life, injury, cancellation and property insurance is available to individual tour members through **Music Travel Consultants** at an additional charge.

Both copies of this Letter of Intent are to be signed and dated by both parties. One copy is to be retained by each. This Letter of Intent, along with attachments described above, consists of the total agreement between **Music Travel Consultants** and **Natick High School Music Department**.

FOR **Music Travel Consultants**:

Date: _____

Position: _____

FOR **Natick High School Music Department**:

Date: _____

Position: _____

MTC® acts only as an agent in providing means of transportation or other services. All tickets are issued and all other services are offered or provided subject to any and all terms and conditions under which such means of transportation or other services are offered or provided. The issuance and acceptance of such services shall be deemed to be consent to the further condition that MTC® shall not be or become liable or responsible in any way in connection with such means of transportation or in connection with other services, or for any loss, injury or damage to or in respect of any person or property howsoever caused or arising, even if such loss, injury or damage arises, in whole or in part, as a result of alleged negligent acts or omissions of Music Travel Consultants. The airlines, trains, motor coaches and ships concerned are not to be held responsible for any act, omission or event during the time passengers are not aboard the airline, train, motor coach or ship. MTC® reserves the right to alter the itinerary. Any extra charges arising from such change must be met by the Passenger. MTC® reserves the right to cancel the tour or to remove any Passenger from the tour; its sole liability in such instance being the refund of all monies paid to it for unused services. By acceptance of tour membership, Passenger agrees to the foregoing and also agrees that MTC® shall not become liable or responsible for loss, damage, injury or inconvenience to Passenger and to his/her possessions caused by or resulting from occurrences, negligent or otherwise, due to the malfunction or breakdown of machinery or equipment, strikes or labor disputes, acts of God, war or civil strife, acts of Governments or Civil Authorities, disease, delays, fire, theft, weather, itinerary changes or cancellation of services or default by suppliers, even if such loss, injury or damage arises, in whole or in part, as a result of alleged negligent acts or omissions of Music Travel Consultants LLC.

TOUR PROPOSAL

Every Bob Rogers Travel tour comes with these essentials:

- Motor coach operators that adhere to the strict USDOT standards for safety
- Payment options tailored to fit your group's needs and schedule (*including the option to have BRT automatically collect payments from travelers through our BRT Payments System*)
- Professional liability insurance and a consumer protection plan as recommended by the Student & Youth Travel Association
- The same high level of service and attention to detail which the company was founded on in 1981

YOU WANT TO GIVE YOUR STUDENTS THE WORLD.
WE HELP YOU TAKE THEM THERE.



Founded by a former music educator, Bob Rogers Travel has been making student travel simple since 1981. Our team's singular focus is to allow you to keep yours – because when you can focus on inspiring students while we handle your trip, we all do our best work. Our team is comprised of educators, musicians and travel professionals. Together, we've planned over 6,000 memorable student travel experiences.

Founded by
a music
educator in
1981

Over
8,000
trips with
650,000
students

Over
500
successful
international
trips

every trip is
custom
no two trips
are alike

Contact JoAnn East at (800) 373-1423 ext. 273 or jeast@bobrogerstravel.com

VALID THRU 4/7/2024

bobrogerstravel.com

(800) 373-1423

Since
1981

TOUR PROPOSAL

TOUR FEATURES

MOTOR COACH

- 3 - 56 passenger motor coach(es)
- Gratuities for your motor coach driver(s)

HOTEL

- 4 Nights' accommodations at Sheraton Pentagon City Arlington
- Breakfast at hotel
- Hotel Room for the Motor Coach Driver(s)
- All Students will pay Quad Occupancy Price (Quad Occupancy must be maximized)

SECURITY

- 3 Dedicated overnight chaperone(s)

MEALS

- Group Dinner & DJ Cruise aboard the Spirit of Washington
- Group Dinner at Hill Country BBQ
- Group Dinner at Hard Rock Cafe
- Group Pizza Dinner
- 2 - Boxed Meals

ATTRACTIONS

- Self-Guided Tour of the Supreme Court
- Excursion to the Basilica of the National Shrine of the Immaculate Conception
- Visit to the Holocaust Memorial Museum (based on availability)
- Excursion to the Pentagon Memorial
- Excursion to the National Mall
- Excursion to the White House
- Excursion to the National Monuments and Memorials
- Excursion to Arlington National Cemetery
- Tour of the U.S. Capitol (based on availability)
- Self-Guided Tour of the Library of Congress
- Guided Illuminated Tour of the Monuments
- Excursion to the Smithsonian Museums

THEATER/ATTRACTION TICKETS

- Ticket to Military Band or National Symphony Orchestra (\$80.00 Budget)

PERFORMANCES

- Performance at a National Monument or Memorial
- Performance at the Basilica of the National Shrine of the Immaculate Conception

ADDITIONAL INCLUSIONS

- BRT Payments - Online Payment System
- BRT Drawstring bag for every participant
- BRT Video Souvenir & Tracking/Messaging App
- 16 Complimentary Director Package(s) (based on double occupancy)
- 3 Onsite Company Tour Director(s)

Contact JoAnn East at (800) 373-1423 ext. 273 or jeast@bobrogerstravel.com

TOUR PROPOSAL

TOUR PRICING

	Paying Participants
	150
Occupancy	
Quad	\$1,576
Triple	\$1,716
Double	\$1,849
Single	\$2,399

Non-inclusions/Options

- Meals stated at student cost
- Rental costs for chairs, stands, instruments or keyboards for performances/clinics (BRT can assist in arranging the rental of these items) at Memorial Performance or rehearsals
- TripMate offers a specially priced Enhanced Trip Protection which includes a CFAR* (Cancel For Any Reason) feature for BRT travelers. *CFAR coverage covers 75% of the nonrefundable trip cost. Trip cancellation must be made with BRT 2 days or more prior to scheduled departure. Traveler must "opt in" to this plan within 14 days of initial deposit to be eligible for CFAR coverage. This benefit is not available for residents in New York.
- Please note: This proposal factors one budget dinner at a Jazz Club or Dinner Cruise (group to choose one of the experiences bases on availability)

This proposal factors the hotel's offer of utilizing rehearsal space for in the breakfast area (as available). If additional rehearsal space is needed rates start at \$500.00 plus tax for space per rehearsal block.

Contact JoAnn East at (800) 373-1423 ext. 273 or jeast@bobrogerstravel.com

VALID THRU 4/7/2024

bobrogerstravel.com

(800) 373-1423

Since
1981

Associations



- Student Youth Travel Association (SYTA)
- National Tour Association (NTA)
- Official Sponsor of Music for All
- American Bus Association (ABA)
- American Choral Directors Association (ACDA)
- Members of 25 State Music Associations
- Official Sponsor of Make-A-Wish
- Producer of the Thanksgiving Parade of Bands

Accolades

- Top Producer for Broadway.com (since 2010)
- Top Producer for the Chicago Symphony Orchestra (since 2013)
- A Disney Youth Programs PremEar Travel Planner
- Top Producer for Disney Performing Arts OnStage at Walt Disney World (since 2011)
- Top Producer for Festival Disney (since 2014)
- Universal Orlando Resort Preferred Youth Travel Planner



Walt Disney World® Resort
PARTNERS AWARD

Presented to Bob Rogers Travel

For exemplary leadership and achievement within the student travel industry providing quality experiences and demonstrating business integrity, while embracing and promoting the Magic of Disney.



GROUPS
TODAY
"TODAY!" Award

it takes to make an impact in the group travel industry—today.

Presented to an ABA member demonstrating that it has what

Disney
IMAGINATION CAMPUS

PERFORMING ARTS
TOP PRODUCER

Financial Protection and Insurance

When you travel with BRT your investment is protected

- Professional liability insurance
- Optional Trip Cancellation Insurance
- Consumer Protection Plan

Schedule of Insurance Benefits	Maximum Benefit Amount	Standard Plan F561S	Enhanced Plan F561E
Cancel For Any Reason Benefit*	75% of Non-Refundable Trip Cost		✓
Trip Cancellation**	up to 100% of the non-refundable insured Trip Cost	✓	✓
Single Supplement	Included	✓	✓
Trip Interruption**	up to 100% of the non-refundable insured Trip Cost	✓	✓
Single Supplement	Included	✓	✓
Additional Trip Interruption	Included under Trip Interruption benefit Maximum	✓	✓
Travel Companion Hospitalization	up to \$150 Per Day, Limited to 5 Days	✓	✓
Missed Connection	\$500	✓	✓
Trip Delay	up to \$150 Per Day, to a Maximum of \$750	✓	✓
Accident & Sickness Medical Expense	\$25,000	✓	✓
Dental Expense Sublimit	\$750	✓	✓
Medical Evacuation & Repatriation of Remains	\$100,000	✓	✓
Additional Medical Evacuation: Transportation Of Children/Child Beside Visit Transportation to Join You	Included Included	✓ ✓	✓ ✓
Political or Security Evacuation & Natural Disaster Evacuation	\$25,000	✓	✓
Baggage and Personal Effects Passport, Visa or Other Travel Documents Replacement Credit Card Charges and Interest Per Article Limit Items Subject to Special Limitations	\$1,500 \$100 \$50 up to \$300 \$600 Maximum Combined	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓
Baggage Delay	\$300 Up to \$50 to expedite the Return	✓	✓
Plan	Rate		
Standard (F561S)	4.55% of Trip Cost		
Enhanced (F561E)	7.60% of Trip Cost		

Contains Insurance and Non-Insurance Assistance Services.

*Not available to NY Residents. Additional terms apply.

**Benefits are only payable if trip is cancelled/interrupted due to a covered peril.

CANCEL FOR ANY REASON BENEFIT* - If You cancel Your Trip for any reason not otherwise covered by this Plan, benefits will be paid for 75% of the unused, forfeited, prepaid non-refundable Payments or Deposits You paid for Your Trip provided: a) Your payment for this Plan is received within 14 days of the date Your initial Payment or Deposit for Your Trip is received; and b) You cancel Your Trip no later than 2 days prior to the Scheduled Departure Date of Your Trip. This Cancel for Any Reason Benefit does not cover the failure of the Retail Travel Supplier to provide the bargained-for Travel Arrangements due to cessation of operations for any reason. These benefit(s) will not duplicate any other benefits payable under the plan or any coverage(s) attached to the plan.

TRIP CANCELLATION - Protects the unused, forfeited, prepaid non-refundable Payments or Deposits for the Travel Arrangements You purchased for Your Trip in the event You have to cancel due to a covered reason.

TRIP INTERRUPTION - Provides You with a reimbursement for the unused, forfeited, prepaid non-refundable Payments or Deposits for land or water Travel Arrangements for Your Trip, plus the Additional Transportation Cost paid, if Your Trip is interrupted for a covered reason.

MISSSED CONNECTION - Provides You with a reimbursement for the unused, forfeited, prepaid non-refundable Payments or Deposits paid to the Travel Supplier for the land or water Travel Arrangements You purchased for Your Trip, plus the additional transportation cost to join Your trip, if You miss Your Trip departure because Your arrival at the Trip destination is delayed for 3 consecutive hours or more for a covered reason.

TRIP DELAY - Assists with Reasonable Expenses incurred when You are delayed 8 consecutive hours or more while en route to or from or during the course of Your Trip for a covered reason.

ACCIDENT & SICKNESS MEDICAL EXPENSE - Provides Medical Expense benefits for a covered Sickness or covered Injury incurred while on Your Trip.

MEDICAL EVACUATION & REPATRIATION OF REMAINS - Among other things, this reimburses transportation expenses incurred to transport you to the nearest medical facility where treatment is available if you incur a sickness or injury that is acute, severe or life threatening during Your Trip.

POLITICAL OR SECURITY EVACUATION & NATURAL DISASTER EVACUATION - Can cover reasonable Political or Security Evacuation or reasonable Natural Disaster Evacuation expenses and Related Costs incurred for Your transportation, if You must interrupt Your Trip for a covered Political or Security Event or Natural Disaster Event and while travelling outside Your Home Country.

BAGGAGE & PERSONAL EFFECTS - Provides reimbursement when your Baggage or personal belongings are damaged, lost or stolen during Your Trip.

BAGGAGE DELAY - Provides reimbursement for the purchase of reasonable additional clothing and personal articles purchased by You if Your Baggage is delayed or misdirected by a Common Carrier for at least 12 consecutive hours or more.

Waiver of the Pre-Existing Medical Condition Exclusion: exclusion for Pre-Existing Condition will be waived provided: (a) Your payment for this Plan is received within 14 days of the date Your initial Payment or Deposit for Your Trip is received; and (b) You are medically able and not disabled from travel at the time Your plan cost is paid based on assessment of a Physician.

*See back for exclusions & limitations.



20230602 - 2934866

Exclusions and Limitations

Unless otherwise shown below, these exclusions apply to You, Your Travelling Companion, Family Member scheduled and booked to travel with You. The following exclusion(s) apply(ies) to the Trip Cancellation and Trip Interruption and Medical Expense. We will not pay for any loss or expense caused due to, arising or resulting from: 1. a Pre-Existing Medical Condition, as defined in the plan. Death resulting from a Pre-Existing Medical Condition will not be excluded. Death must occur prior to the termination date of the benefit under which the claim is being made. The following exclusions apply to the Medical and Dental Expense benefits. We will not pay for any loss or expense caused due to, arising or resulting from: 1. routine physical examinations or routine dental care; 2. traveling for the purpose or intent of securing medical treatment or advice; 3. any Trip taken against the advice of a Physician and any losses occurred during such Trip; 4. Elective Treatment and Procedures; 5. care or treatment which is not Medically Necessary, except for related reconstructive surgery resulting from trauma, infection or disease that first manifests or occurred during Your Trip; 6. any medical service provided by You, a Family Member, or Travelling Companion; 7. any treatment or medication which, at the time of Your Scheduled Departure Date, is required to be continued during Your Trip; 8. Alcohol or substance abuse or treatment for the same including admittance to a rehab facility; 9. Normal pregnancy (except Complications of Pregnancy) or childbirth, except as specifically covered under Trip Cancellation or Trip Interruption or elective abortion; 10. a Mental, Nervous or Psychological Condition or Disorder unless Hospitalized or Partially Hospitalized while the plan is in effect. Hospitalized or Partially Hospitalized requirement does not apply to dementia when death results; 11. any loss that results from an illness, disease or other condition, event or circumstance that occurs at a time when the plan is not in effect for You; 12. Your participation in Adventure or Extreme Activities, riding or driving in races, or participation in speed or endurance competition or events, except as a spectator; 13. diving if You are not certified to dive and a dive master is not present during the dive; 14. Your participation in an organized athletic or sporting competition, contest, or stunt under contract in exchange for an agreed-upon salary or compensation. This does not include athletes participating in exchange for a scholarship or tuition.

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 - Individual Travelers
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- Share pictures with the Group
 - Download to Any Device
 - Send to Family & Friends
- Share Documents**
- Itineraries
 - Safety Protocols
 - Checklists
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Made from YOUR GROUP'S Pictures

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- ✓ **Everyone on the trip** receives access to download the group's keepsake video & photos.

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3.

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4.

We send users a notification to view the keepsake videos and all the photos that were shared by everyone to download to keep for a lifetime.



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The video reinforces the educational purpose of your trip and can be used to promote future trips.

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1



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You'll start by sending out a link to your trip page. There, in just a few minutes, adults can complete registration for their student travelers. With a few short clicks, they'll submit all the required information – without you collecting a thing.

2



Online Payments

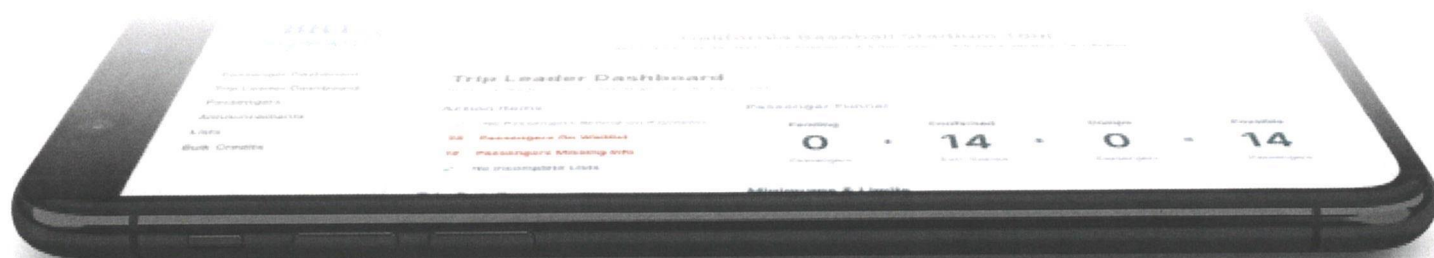
Next up, families can easily pay online and customize their payment preferences. They can set up an easy-to-manage payment schedule, create multiple parent accounts if they need them, and more. Fundraising and booster money can be applied here, too!

3



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BRT
Payments

ITEM TITLE: Memorial Field Rededication Update
DATE:
ITEM TYPE:
ITEM SUMMARY:
BACKGROUND INFORMATION:
RECOMMENDATION:

ITEM TITLE: Policy Subcommittee Update

DATE:

ITEM TYPE:

ITEM SUMMARY:

BACKGROUND INFORMATION:

RECOMMENDATION:

ITEM TITLE: School Committee Handbook Update
DATE:
ITEM TYPE:
ITEM SUMMARY:
BACKGROUND INFORMATION:
RECOMMENDATION:

ITEM TITLE: Adoption of Specialized Code as Specified in the Warrant Article for
Spring Town Meeting

DATE:

ITEM TYPE:

ITEM SUMMARY:

BACKGROUND

INFORMATION:

RECOMMENDATION:

ITEM TITLE: Student Opportunities Act (SOA) Report Follow Up - Sue Balboni/Assist
Superintendent for TLI

DATE:

ITEM TYPE:

ITEM SUMMARY:

BACKGROUND

INFORMATION:

RECOMMENDATION:

ITEM TITLE: METCO Program Data Presentation - Rasheedah Clayton/METCO Director

DATE:

ITEM TYPE:

ITEM SUMMARY: LINK - 2023 Blueprint for METCO
LINK - 2023 Blueprint for METCO final

BACKGROUND INFORMATION:

RECOMMENDATION:

ATTACHMENTS:

Description	File Name	Type
2023 Blueprint for METCO	Natick_METCO_Individual_district_results_(4).pdf	Cover Memo
2023 Blueprint for METCO final	2023_METCO_Report_FINAL_(1).pdf	Cover Memo



2023 Blueprint for METCO Alignment Survey Results

Natick Public Schools

Respondents: Superintendent, Assistant Superintendent, METCO Director (n=3)

Introduction

This document provides a summary of individual responses to the 2023 Blueprint for METCO Alignment Survey from team members at Natick Public Schools.

The numbers in each box represent the number of individuals from your district who selected that response when completing the survey. We have not indicated which individuals gave each response.

Color coding has been provided to make the document easier to scan. Darker shades of blue indicate that more people selected that option. Lighter shades of blue indicate that fewer people selected that option. No color indicates that nobody selected that option.

How to Use This Document

We recommend that district leadership teams schedule a meeting to review this document together, along with the Blueprint for METCO report.

District teams should use that discussion to:

- a. Discuss questions to which respondents gave varying responses
- b. Establish consensus on the single, most accurate response to each question (we recommend printing the document and circling the group's final answer to each question).
- c. Identify 1-2 framework commitments that the district will prioritize for improvement* over the next 12 months. Selected commitments should be named in the district's 2024 METCO grant application).

*"Improvement" means either expanding current practices across the district (moving from "in some schools" to "district-wide") or establishing new practices that address framework criteria that your district does not meet today (i.e., your consensus answer is "no.").

Section 1: Commitments to All Stakeholders
A Structural Commitment to Racial Equity and Integration

Does your district provide all stakeholders with...	No	In some schools	Yes, district-wide	Not sure
A public statement of commitment to advancing Racial Equity and Integration across the district	1		2	
A strategic plan for advancing Racial Equity and Integration (or section of the district's strategic plan)			3	
Annual objectives and key results for making progress on the REI strategic plan			3	
Annual reporting on progress toward REI objectives and key results			3	
A formal policy of evaluating district policies and practices for racial equity concerns – and a tool for evaluating those policies and practices	1		2	
A formally adopted tool for evaluating policies and practices with a racial equity lens	1		2	
Protected budget for REI initiatives with oversight of REI spending by the district's lead administrator for REI	1		2	
Dedicated administrators for Racial Equity and Integration	1		2	
Oversight of spending from the REI budget by the district's lead administrator for REI	1		1	1



Section 1: Commitments to All Stakeholders

Framework Category: Voice and Representation in District Decisions

Does your district provide all stakeholders with...	No	In some schools	Yes, district-wide	Not sure
BIPOC representation on school and district governing bodies (administration and school board)	2		1	
A process for gathering input on equity implications for District Policies and Decisions		1	1	1

Section 1: Commitments to All Stakeholders

Framework Category: Ongoing Education About Racism, Equity, and Integration in Schools

Does your district provide all stakeholders with...	No	In some schools	Yes, district-wide	Not sure
Programming and events designed to equip students, families, and staff to talk about and take action against racism		1	2	
Prominent display and distribution of materials designed to equip students, families, and staff to talk about and take action against racism		1	1	1

Section 2: Commitments to All Students

Framework Category: Representative and Inclusive Classroom Pedagogy

Does your district provide all students with...	No	In some schools	Yes, district-wide	Not sure
Inclusive, anti-racist curricula that reflect and build understanding of diverse communities and cultures			3	
Teachers trained to recognize and remove bias from their language and behaviors		2	1	
Equitable policies for grading and assessment focused on mastery rather than compliance	2	1		
Instruction from BIPOC teachers and staff who represent a diverse array of cultural identities	1	2		

Section 2: Commitments to All Students

Framework Category: An Inclusive, Anti-Racist School Environment

Does your district provide all students with...	No	In some schools	Yes, district-wide	Not sure
Students trained to recognize and address implicit bias and racist language/actions		2	1	
Visuals that representations that value diverse cultures and identities and cause no harm through racist association		2	1	
Staff trained in healing centered perspectives of student behavior to enable restorative rather than harmful interactions	1	1	1	
Written expectations for inclusive and respectful behavior for both students and staff	1	1	1	
Written expectations for anti-racist responses to student behavior for teachers, and staff	1	1	1	

Section 2: Commitments to All Students

Framework Category: Equal Inclusion in Extra-Curricular Opportunities

Does your district provide all students with...	No	In some schools	Yes, district-wide	Not sure
Proactive recruiting of BIPOC students for clubs, sports, and arts activities that intentionally counteract historical inequities and stereotypes	1	2		
Coaches and directors trained to recognize and address implicit bias and racist language/actions			2	1
Equitable scheduling for extra-curricular offerings, ensuring that student participation is not limited by conflicting requirements	1		1	1
Transportation to and from activities and events that occur outside the school day (i.e., a late bus)	1		2	

Section 2: Commitments to All Students

Framework Category: Personalized Support for Academic and Post-Secondary Success

Does your district provide all students with...	No	In some schools	Yes, district-wide	Not sure
Defined on-ramps to grade-level work, specifying what a student needs to master and how they will get there			3	
Skills-based grouping for foundational skills development in core subjects of English and Math			3	
Proactive placement in higher-level coursework (i.e., Advanced Placement courses)		2	1	
High expectations for student achievement from teachers and staff that are defined and reinforced across the district		1	2	
Data-driven college application guidance to ensure students attend institutions with a track record of support success			2	1

College application and FAFSA completion support to ensure paperwork and complex process do not prevent college enrollment			2	1
Exposure to a broad array of career possibilities and career programming designed to counteract historical stereotypes			2	1
Support to align coursework with post-secondary aspirations, ensuring that students have access to pre-requisite courses			2	1
Access to internship opportunities and work-based learning that reflects students' career aspirations and interests			2	1

Section 2: Commitments to All Students

Framework Category: Basic Needs Support and Wraparound Services

Does your district provide all students with...	No	In some schools	Yes, district-wide	Not sure
Transportation to and from school including extended hours			3	
Mental health services provided within their school including access to BIPOC counselors and support staff		1	2	
Physical health services provided within their school including access to BIPOC physicians and school health staff	1	1	1	
Free meals and nutrition within the school day regardless of socio-economic status			3	
Services to address basic needs insecurity addressing housing, clothing, food, and technology insecurity			3	
A trusted adult who understands and can advocate for their needs or process for ensuring connection to a trusted adult within their school		1	2	

Section 3: Commitments to All Employees

Framework Category: Inclusive and Equitable Hiring and On-Boarding Processes

Does your district provide all employees with...	No	In some schools	Yes, district-wide	Not sure
Standardized interview processes and candidate evaluation criteria audited for potential concerns related to equity and racism			3	
A structured on-boarding program that provides access to resources required for success in their role			3	
A formal mentor to understand and advocate for their needs and concerns			3	
Proactive recruitment of BIPOC employees for professional roles including teaching, counseling, and administrative positions		1	2	

Section 3: Commitments to All Employees

Framework Category: Equitable, Anti-Racist Support for Career Advancement

Does your district provide all employees with...	No	In some schools	Yes, district-wide	Not sure
District-sponsored forums for BIPOC educators that provide regular access to school principals and the superintendent	1		2	
Professional development opportunities provided by and designed for BIPOC educators	1	1	1	
Formal career conversations with direct supervisors at least once per year	2		1	
Defined career ladders and/or lattices to provide a clear vision of career possibilities within the district	1		2	

Section 3: Commitments to All Employees

Framework Category: Access to Social and Emotional Support

Does your district provide all employees with...	No	In some schools	Yes, district-wide	Not sure
Access to mental health services through district benefits including partnerships with BIPOC mental health providers	2		1	
Peer support networks for community, connection, and processing including protected time and space for groups to meet in schools				
A formal process for identifying and acting on factors affecting staff morale and wellbeing		1	2	
Proactive communication of support services available to staff, including prominent display in high-traffic areas and the principal's office	1	1	1	

Section 4: Commitments to All Families

Framework Category: Connection and Agency Within the School and District Community

Does your district provide all families with...	No	In some schools	Yes, district-wide	Not sure
Direct contact with an appointed staff member who knows their child and can advocate for their child's needs		1	2	
Communication through channels that are accessible to all parents and regularly vetted for equity concerns		1	2	
The opportunity to participate in the parents' association(s) and parent committees			3	
Policies to ensure inclusive behaviors and practices in parents' associations and parent committees		1	1	1
Proactive communication of upcoming meetings and events that involve parents/family/caregiver attendance and participation			3	

Section 4: Commitments to All Families

Framework Category: Ways to Support Their Child at School Meetings and Events

Does your district provide all families with...	No	In some schools	Yes, district-wide	Not sure
Accessible scheduling protocols for essential meetings and events where the timing is within the school or district's control	1		2	
Transportation options for essential meetings such as parent/teacher conferences	2		1	
Alternative options for participating in/attending meetings and events including live-streams and recorded media			3	
Proactive communication of upcoming meetings and events that their child will participate in			3	



2023 EDITION

A Blueprint for METCO

Who We Want to Be, Where We Are Today, and How Districts Are Working to Advance Racial Equity and Integration in Their Schools



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Table of Contents

Introduction. [4](#)

Methodology. [5](#)

Sections of this Report [6](#)

A Blueprint for METCO [7](#)

Examples of Excellence. [27](#)

2023 Blueprint Alignment Survey Results. [45](#)

Summary and Next Steps [63](#)

Blueprint Citations and Links to Relevant Resources. [66](#)

Introduction

Building a Blueprint for METCO



This project began with a question: What does it mean to be METCO?

Through events, group discussions, and interviews, it has become clear that METCO is much more than a program. The METCO partnership represents a commitment to building schools that identify and address longstanding injustices – so that all students can attend schools in which they are safe, loved, celebrated, and free to learn. Our mandate was to create a guiding framework that METCO districts can collectively use to advance that commitment: a Blueprint for METCO.

Therefore, the Blueprint for METCO needed to meet two criteria:

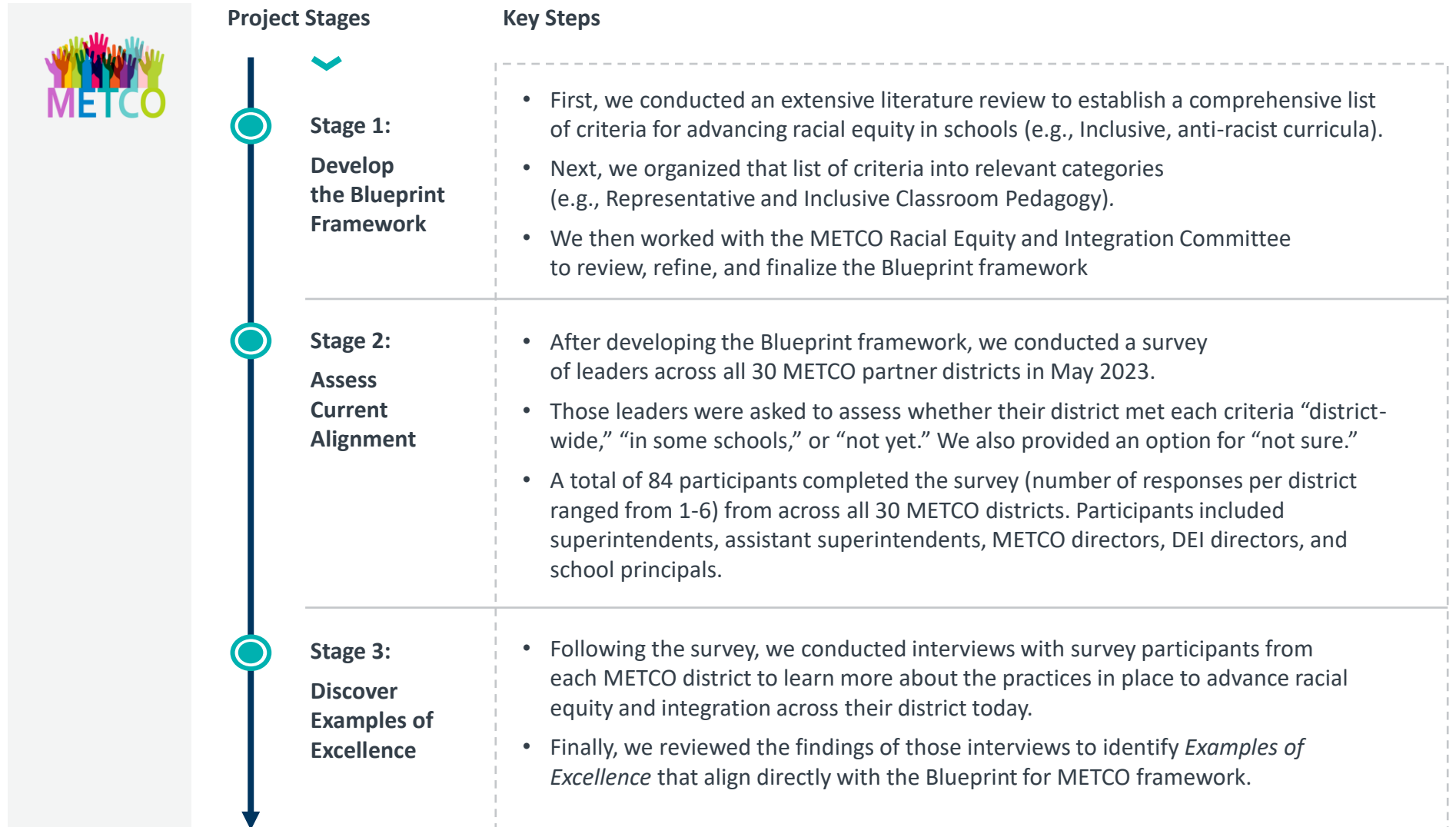
- Every item included in the Blueprint must contribute to advancing Racial Equity and Integration in schools by addressing the systemic injustices and inequities experienced by BIPOC students, employees, and families today
- Every item on the framework must also benefit *all* students, employees, and families; either because the practice is universally beneficial, or because creating space for diversity is inherently beneficial to all school communities.

Through a review of existing research and partnership with the METCO Racial Equity and Integration Committee, we used those guidelines to build a framework that is intentionally expansive and comprehensive. Our goal was to create a document that enables not just discussion but action for the benefit of *all* students, staff, and families across the network of METCO partner districts.

Some of the elements included in the framework have existing solutions. Some will require innovation and members of this progressive partnership to build new practices together. The aspiration for the Blueprint is simple: for every partner district to make progress on at least 1-2 items each year. With this approach, each district can work on the issues that are relevant and achievable in their schools while collectively making progress toward a common vision for what it means to be METCO.

Methodology

How We Built the Blueprint, Assessed Current Alignment, and Gathered Examples of Excellence



Sections of This Report



This report is organized into four sections:

Section 1: A Blueprint for METCO. The Blueprint is organized as a collection of 13 commitments that METCO districts should make to four groups: all stakeholders, all students, all employees, and all families. Each commitment plays a role in advancing racial equity and integration in schools, and is accompanied by tangible criteria that districts can meet to fulfill each commitment. We have labelled these criteria as *Components of Best Practice*, provided a brief description of why each matters, and added links to additional resources for many (though not all) of these criteria.

Section 2: Examples of Excellence. Here we provide descriptions of practices and initiatives that align with some of the Blueprint commitments, sourced through interviews with district leaders. Most come from within the METCO partnership, but we have also included a couple from districts not affiliated with METCO to raise awareness of work being done to advance racial equity in other regions. We documented these practices to provide inspiration to other districts and inspire shared learning and collaboration across the METCO partnership. Our goal is to grow this library over time through continuing to gather new practices from METCO districts.

Section 3: 2023 Blueprint Alignment Survey Results. Next, we share the results of our inaugural Blueprint Alignment Survey. These results, gathered between May and August 2023, show how leaders from across METCO districts believe their district aligns with each of the *Components of Best Practice* today. Each individual district will also receive a copy of their responses separately to this report to promote group reflection and discussion among district leadership teams.

Section 4: Summary and Next Steps. Our final section provides five takeaways from this year's survey results and three requests for next steps that METCO districts can take after reading this report. Ultimately, the objective is for every METCO partner district to select and make progress on 1-2 components of the Blueprint each year.

SECTION 1

A Blueprint for METCO

14 Unifying Commitments for Building Just, Equitable, Integrated Schools

Section Contents: A Blueprint for METCO

About the Blueprint for METCO.9

How to Read This Section.10

Framework: A Blueprint for METCO 11

Commitments to All Stakeholders13

Commitments to All Students16

Commitments to All Employees22

Commitments to All Families 25

About the Blueprint for METCO



The Blueprint for METCO is designed to establish a roadmap for advancing Racial Equity and Integration in districts across the METCO partnership. This is not a guide for how districts should provide support to students from Boston who are enrolled in the METCO program. This Blueprint is designed to help districts address the many ways in which BIPOC students experience the effects of systemic racism and inequity in schools for the benefit of all members of each school community.

The Blueprint is organized as 13 commitments. These commitments address the outcomes that every student, employee, and family member should experience in just, integrated, and equitable schools – regardless of their race or cultural identity. These commitments are, in many ways, the most important part of the framework. Any district that can demonstrate having met each of those commitments for all stakeholders would be truly exceptional among school systems nationwide. We encourage readers to pause on page 12 and reflect on how their district meets each of the 13 commitments today.

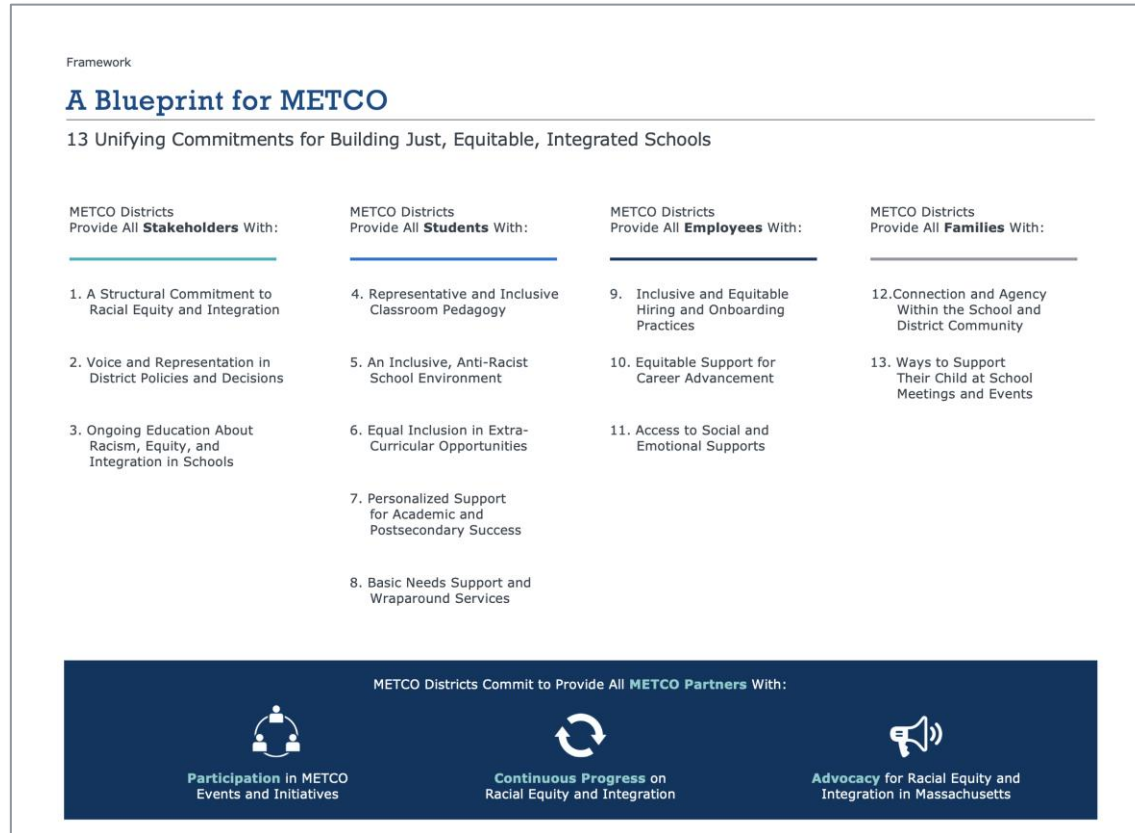
We have also listed three additional commitments that METCO districts can make to each other. This unique partnership will be strongest if districts work together to advance racial equity and integration in their schools. While we do not spend additional time on those three commitments in this report, they will play a crucial role in the future success of the METCO partnership.

Under each of the 13 primary commitments, we have listed *Components of Best Practice*. These are related, research-backed criteria for addressing the many manifestations of systemic racism and racial inequity in their schools. For each component of best practice, we have provided a brief description of “why this matters.” You will find links to supporting articles and research (where relevant) in the Endnotes section of this report.

Finally, we have included links to resources that will enable districts to move from exploration to action within each commitment within the framework. These can be found on the right-hand side of each page within the *Components of Best Practice* section. Just click on the arrows to access toolkits, guides, and additional research, or find the relevant URL in the Relevant Resources section of this document.

How to Read This Section: The Blueprint Framework

See Page 12



Four categories of commitments: Those for all stakeholders, those for students, those for employees, and those for families



Thirteen commitments. Each of which contribute to creating just, equitable, and integrated schools.



Three additional commitments to each other. These commitments will be central to the success of the METCO partnership and making collective progress toward a shared vision for just, equitable, and integrated schools

How to Read This Section: Components of Best Practice

See Pages 13-26

Blueprint commitment and relevant stakeholder group

Each page aligns with one of the commitments outlined in the Blueprint Framework (p.10)



METCO Districts Provide All Stakeholders With...

A Structural Commitment to Racial Equity and Integration

Components of Best Practice	Why This Matters	Relevant Resources
1.1 A public statement of commitment to advancing racial equity and integration across the district	Public statements of commitment to advancing racial equity are an essential first step toward becoming an anti-racist institution. They establish a form of social contract through which the community can hold the district accountable for action and change.	Guide: Hallmarks of an Anti-Racist K-12 Institution →
1.2 A strategic plan for advancing Racial Equity and Integration (or section of the strategic plan)	Dedicated strategic plans for advancing racial equity translate statements of commitment into district-specific goals and actions and should be rooted in an assessment of where the district needs to make progress today.	Presentation: Spotlighting Pitfalls to Avoid in DEI Plan Design →
1.3 Annual objectives and key results for making progress on REI initiatives	Establishing annual objectives for advancing racial equity and integration, along with measurable key results, helps to ensure that a district's efforts remain active and ongoing rather than gathering dust on a shelf in a five-year plan.	
1.4 Annual reporting on progress toward REI objectives and key results	Transparent reporting on how the district is making progress toward those objectives and key results helps to build community trust through showing that progress is happening. An annual report also creates an extra layer of accountability to ensure that this crucial work continues to be a priority and move forward across the district.	



Relevant Resources

Live links to toolkits, examples, related programs, and additional research to drive conversation and action within each Blueprint commitment.



Components of best practice

Tangible criteria that districts can meet to fulfill each commitment



"Why this matters"

A brief description of why each component was added to the Blueprint. Links to supporting research are provided in the Endnotes section of this report.

A Blueprint for METCO

13 Unifying Commitments for Building Just, Equitable, Integrated Schools

METCO Districts
Provide All **Stakeholders** With:

1. A Structural Commitment to Racial Equity and Integration
2. Voice and Representation in District Policies and Decisions
3. Ongoing Education About Racism, Equity, and Integration in Schools

METCO Districts
Provide All **Students** With:

4. Representative and Inclusive Classroom Pedagogy
5. An Inclusive, Anti-Racist School Environment
6. Equal Inclusion in Extra-Curricular Opportunities
7. Personalized Support for Academic and Postsecondary Success
8. Basic Needs Support and Wraparound Services

METCO Districts
Provide All **Employees** With:

9. Inclusive and Equitable Hiring and Onboarding Practices
10. Equitable Support for Career Advancement
11. Access to Social and Emotional Supports

METCO Districts
Provide All **Families** With:

12. Connection and Agency Within the School and District Community
13. Ways to Support Their Child at School Meetings and Events

METCO Districts Commit to Provide All **METCO Partners** With:



Participation in METCO
Events and Initiatives



Continuous Progress on
Racial Equity and Integration





Advocacy for Racial Equity and
Integration in Massachusetts

A Structural Commitment to Racial Equity and Integration

Components of Best Practice	Why This Matters	Relevant Resources
1.1 A public statement of commitment to advancing racial equity and integration across the district	Public statements of commitment to advancing racial equity are an essential first step toward becoming an anti-racist institution. They establish a form of social contract through which the community can hold the district accountable for action and change.	Guide: Hallmarks of an Anti-Racist K-12 Institution → Presentation: Spotlighting Pitfalls to Avoid in DEI Plan Design →
1.2 A strategic plan for advancing Racial Equity and Integration (or section of the strategic plan)	Dedicated strategic plans for advancing racial equity translate statements of commitment into district-specific goals and actions and should be rooted in an assessment of where the district needs to make progress today.	
1.3 Annual objectives and key results for making progress on REI initiatives	Establishing annual objectives for advancing racial equity and integration, along with measurable key results, helps to ensure that a district's efforts remain active and ongoing rather than gathering dust on a shelf in a five-year plan.	
1.4 Annual reporting on progress toward REI objectives and key results	Transparent reporting on how the district is making progress toward those objectives and key results helps to build community trust through showing that progress is happening. An annual report also creates an extra layer of accountability to ensure that this crucial work continues to be a priority and move forward across the district.	

A Structural Commitment to Racial Equity and Integration (Continued)

Components of Best Practice	Why This Matters	Relevant Resources
1.5 A formally adopted policy of evaluating policies and practices with a racial equity lens	Strategic plans and initiatives are important for advancing racial equity, but board-adopted policy ensures that expectations for advancing racial equity apply district-wide and everyone is accountable for change.	Example: Jefferson County Racial Equity Policy Expectations 
1.6 A formally adopted tool for evaluating policies and practices with a racial equity lens	A district-wide tool equips all employees and teams to apply a consistent approach when crafting and reviewing policies or practices. This will help avoid blind spots and biases, especially when teams lack BIPOC representation.	Webinar: Evaluating K-12 Policies Under a Racial Equity Lens 
1.7 Dedicated administrators for Racial Equity and Integration	While advancing racial equity and integration should be everyone's job, ensuring that it is also someone's only job is essential for ensuring ongoing accountability and action.	
1.8 Protected budget for REI initiatives	Districts need to do a lot with limited resources. As a result, equity initiatives are often deprioritized, delayed, or diminished as competing needs arise. Establishing protected funds helps to enable continuous progress toward racial justice and equity, each and every year.	
1.9 Oversight of spending from the REI budget by the district's lead administrator for REI	As an extension of protected budget, ensuring that the person primarily responsible for advancing racial equity across the district has oversight of those funds helps to ensure that, when those funds are used, advancing racial justice and equity is the primary purpose.	

Voice and Representation in District Decisions

And Ongoing Education About Racism, Equity, and Integration in Schools

Components of Best Practice

Why This Matters

Relevant Resources

2.1 A process for gathering input on equity implications for district policies and decisions

While a tool for evaluating policies and practices with an equity lens ensures consistency, there is no substitute for a process that gathers input from BIPOC members of the community who will be affected by policies and decisions.

2.2 BIPOC representation on school and district governing bodies (administration and school board)

BIPOC communities need (and need to see) representation in the groups making school and district-level decisions. Given that just 14% of school board members¹ and 5% of Massachusetts school superintendents² (2023) identify as people of color, we have a long way to go.

3.1 Prominent display and distribution of materials designed to equip students, families, and staff to talk about and take action against racism

Sustaining awareness of systemic racism beyond tragic events and periods of national outcry will require institutions to keep the conversation top of mind. Keeping visible reminders of the need to confront systemic racism helps to ensure continued awareness of a district's commitment to this work

3.2 Programming and events designed to equip students, families, and staff to talk about and take action against racism

(As above) sustaining awareness of systemic racism beyond tragic events and periods of national outcry will require institutions to keep the conversation top of mind through frequent dialogue and events.

Guide: Education Development Center Systemic Equity Review Framework







Article: How School and District Leaders can Address Systemic Racism With Their Communities






Representative and Inclusive Classroom Pedagogy


And Ongoing Education About Racism, Equity, and Integration in Schools

Components of Best Practice	Why This Matters	Relevant Resources
4.1 Inclusive, anti-racist curricula that reflect and build understanding of diverse communities and cultures	Research has shown that culturally responsive curricula can improve student achievement and attendance in both K-12 schools and institutions of higher education. But recent studies ³ show that White authors and illustrators still outnumber black authors and illustrators by 7 to 1 and representation of BIPOC characters frequently lack depth and reinforce stereotypes in school curricula today.	Toolkit: NYU Culturally Responsive Curriculum Scorecards 
4.2 Teachers who have been trained to recognize and remove bias from their language and behaviors	Recent quantitative analyses ⁴ have begun to confirm what many already knew: higher levels of racial bias (both implicit and explicit) bias correlate with wider disparities in test scores and suspension rates between White and Black students. With a teaching workforce that is 75% white ⁵ , helping educators to identify and address those biases is critical for improving outcomes among students of color.	Article: What Makes Effective Anti-Bias Training 
4.3 Grading policies that have been audited for equity concerns	Up to 40% of traditional grading criteria do not focus on what students have learned and mastered ⁶ , often assessing factors that are beyond some students' control. As a result, disadvantaged students often end up with lower grade-point averages than more fortunate peers, even if their test scores are the same.	Toolkit: EAB's Equitable Grading Audit 
4.4 Instruction from BIPOC teachers and staff who represent a diverse array of cultural identities	Recent reports ⁷ show that only 7% of teachers in the US are Black, and just 1 in 5 identifies as a person of color. The importance of increasing those numbers is hard to understate. Black students who have even one Black teacher in elementary school are 13% more likely to enroll in college. They are also less likely to experience discipline issues and significantly more likely to graduate from high school. In short, increasing teacher diversity should be a priority for nearly every district, every year.	Program: National Center for Teacher Residencies Black Educators Initiative 

An Inclusive, Anti-Racist School Environment

Components of Best Practice	Why This Matters	Relevant Resources
<p>5.1 Training (for students) on how to recognize and address implicit bias and racist language/actions</p>	<p>Most literature on implicit bias and microaggressions in schools focuses on adult-student or adult-adult interactions, but interactions between students have an equally large role to play in building a culture of inclusion and belonging. Helping young people develop an understanding of and empathy for others is crucial for combatting bullying and other exclusionary behaviors.</p>	<p>Program: NFHS/Project Implicit Implicit Bias Elective</p> 
<p>5.2 Visual representations that value diverse cultures and identities and cause no harm through racist association</p>	<p>Exposure to negative symbols⁸, such as those associated with racism and oppression, can lead to low motivation and self-esteem for BIPOC students. Therefore, in addition to increasing the representation of diverse cultures and identities, schools should also evaluate whether visuals carry negative associations and potential for psychological harm.</p>	<p>Research: Designing classrooms to maximize student engagement</p> 
<p>5.3 Staff trained in healing-centered perspectives of student behavior to enable restorative rather than harmful interactions</p>	<p>The movement to build healing-centered communities brings together principles of restorative practices, trauma-informed care, and social-emotional learning to help individuals and groups process and trauma and traumatic events. Healing-centered schools “work as a community⁹ to ensure that all students, parents/caregivers, and staff feel physically, psychologically, and emotionally safe in their school.”</p>	<p>Toolkit: The Healing-Centered Framework for Chicago Public Schools</p> 
<p>5.4 Written expectations for inclusive and respectful behavior for both students and staff</p>	<p>Establishing consistent expectations for behavior helps to create a predictable environment in which students can learn and thrive – while minimizing the opportunity for disparities in discipline that stem from shifting expectations between one classroom and the next.</p>	
<p>5.5 Written expectations for anti-racist responses to student behavior from administrators, teachers, and staff</p>	<p>Just as consistent expectations for behavior between classrooms helps build predictability, clarifying appropriate responses to student behavior reduces the opportunity for bias to influence discipline and teacher-student interactions.</p>	

Equal Inclusion in Extra-Curricular Opportunities

Components of Best Practice	Why This Matters	Relevant Resources
<p>6.1 Proactive recruitment of BIPOC students for clubs, sports, and arts activities that intentionally counteract historical inequities and stereotypes</p>	<p>Participation in extra-curricular activities is associated with positive effects on student engagement, attendance, and achievement. But, among other factors, the "disproportionate funneling¹⁰" of African-American students into select activities such as football, basketball, and cheerleading has contributed to a situation in which African-American children are underrepresented in most extra-curricular activities.</p>	<p>Research: Extra-Curricular Participation in Kindergarten</p> 
<p>6.2 Coaches and directors trained to recognize and address implicit bias and racist language/actions</p>	<p>As with all other teachers and staff, training coaches and directors to identify and address their own biases and behaviors is crucial for ensuring a psychologically safe and inclusive group/learning environment.</p>	
<p>6.3 Equitable scheduling for extra-curricular offerings, ensuring that student participation is not limited by conflicting requirements</p>	<p>Studies indicate that availability¹¹, cost, and transportation¹² are the primary reasons why BIPOC students are underrepresented in extra-curricular programs, but we also hear frequent reports that participation is limited for students who need to participate in small-group interventions and learning recovery programs.</p>	
<p>6.4 Access to transportation to and from activities and events that occur outside the school day</p>	<p>As stated above, lack of access to transportation is at the top of the list of factors limiting participation in extracurricular or after-school programs. Studies indicate that Black parents' concerns around the safety of travel options¹³ have also risen noticeably in recent years.</p>	

Personalized Support for Academic and Post-Secondary Success (Pt.1)

Components of Best Practice

Why This Matters

Relevant Resources

7.1 Defined on-ramps to grade-level work, specifying what a student needs to master and how they will get there

Limiting students to traditional course sequences and interventions can make “catching up” an insurmountable task. Case in point: A [study](#)¹⁴ conducted in Chicago Public Schools found that fewer than half of students who fail Algebra I in Grade 9 recover the course credit by their fourth year of high school. Prioritized mastery progressions can promote faster progress through providing both clarity and agency in the learning process.

Toolkit:
Curriculum
Prioritization Tool



7.2 Skills-based grouping for foundational skills development in core subjects of English and Math

Grouping proficiency level is common-practice for Tier 2 interventions, but research shows that very few students progress from one group to the next within a school year. Skills-based grouping uses diagnostics to group students based on the skills they most need to master, and has been shown to drastically increase the number of students who “graduate out” of needing Tier 2¹⁵ interventions to meet grade-level proficiency requirements.

Toolkit:
Skills-Based
Grouping for
Early Literacy



7.3 Proactive placement in higher-level coursework (i.e., Advanced Placement courses)

Participation in AP classes and advanced coursework has been shown to increase students’ likelihood of enrolling in college¹⁶ and their belief that they can be successful in a college environment. But while 15% of all high school students are Black, Black students represent just 9.5% of those enrolled in Advanced Placement courses¹⁷. Adopting the belief that students should enroll in advanced coursework unless sufficient evidence exists that will not be successful helps to change the bias-laden process by which some students are encouraged to take advanced classes (and others are not) today.

Example:
Orange County’s
Advanced
Placement Matrix






7.4 High expectations for student achievement from teachers and staff that are defined and reinforced across the district

Research has shown that Black students are more likely to graduate from high school when their teachers have high expectations for student achievement, and Black teachers are 40% more likely than White teachers to predict that the same Black student will graduate from high school¹⁸. Districts need to reduce that gap through working to establish high expectations for all students, regardless of race.


Research:
Closing the College
Access Gap





Personalized Support for Academic and Post-Secondary Success (Pt.2)

Components of Best Practice	Why This Matters	Relevant Resources
7.5 Data-driven college application guidance to ensure students attend institutions with a track record of success	Data show that up to 1 in 3 undergraduate students do not complete their degree program ¹⁹ . This can be a strong deterrent to enrollment, especially for those who would be first-generation college students. However, graduation rates for students of color vary significantly between schools ¹⁶ , so districts should track enrollment and completion rates for schools that their students attend to provide data-informed recommendations to those students considering a college degree after high-school.	Toolkit: Success-Focused College Counseling  Toolkit: FAFSA Submission Support Resources  Research: Meeting the Career Readiness Imperative 
7.6 College application and FAFSA completion support to ensure paperwork and complex process do not prevent college enrollment	For students in the lowest economic quintile, FAFSA completion is associated with a 127% increase in immediate college enrollment ²⁰ . But this famously complex process – along with the rest of the college application process, can be prohibitively difficult for many first-gen students, so districts can have a significant impact on postsecondary outcomes by simply facilitating completion of the necessary paperwork for all students who are interested in post-secondary education.	
7.7 Exposure to a broad array of career possibilities and career programming designed to counteract historical stereotypes	Students' often form career identities based on the roles they see occupied by family, close community members, and those they relate to in the media ²¹ . This perpetuates stereotypes and limits awareness of career possibilities that could lead to both higher earnings and greater job satisfaction. To change those trajectories, districts should work to expand students' career awareness as early as middle school	
7.8 Support to align course selections with college and career aspirations , ensuring that students have access to pre-requisite courses	Expanding career awareness is only half the challenge. Districts then need to clarify which courses students need to take to pursue career options that are unfamiliar to their family or within their social network. Career clusters and pathways are a well-established way to meet this need.	
7.9 Access to internship opportunities and work-based learning that reflects students' career aspirations and interests	Many students enroll in postsecondary coursework without adequately understanding their career interests ²² . Changing program can increase a student's time to degree, adding significant expense. Therefore, districts should focus on helping students to test potential careers through work-based learning to inform their postsecondary path.	

Basic Needs Support and Wrap-Around Services

Components of Best Practice	Why This Matters	Relevant Resources
8.1 Transportation options to and from school including extended hours	Black households are 3x more likely not to have access to a vehicle ²³ than White households (18% vs 6%). Also, as stated previously in this report, concerns among Black parents about safety of public transportation continue to rise. Therefore, access to opportunity for many students starts with access to a school provided bus.	Research Brief: Are District's the Nation's Adolescent Mental Health Providers? 
8.2 Mental health services provided within their school including access to BIPOC counselors and support staff	More than half of Black youth ²⁴ experience moderate to major symptoms of depression. But chronic shortage of clinical providers, long wait times for those that do exist, and lack of transportation make access to mental health care impossible for many students. School-based services have become the only viable option for equitable access to care in most communities.	
8.3 Physical health services provided within their school including access to BIPOC physicians and school health staff	School-based healthcare helps to combat equity gaps in access to care for many families. The greatest challenge here is finding BIPOC health professionals. Data show Black families experience better outcomes when treated by Black doctors, but fewer than 6% of U.S. doctors today are African American ²⁵ . It goes without saying that this is not an easy problem to solve.	
8.4 Free meals and nutrition within the school day regardless of socio-economic status	"The stigma around free school meals can be so strong that children don't want to eat them. Research ²⁶ led by Cohen found that 42% of families eligible for free or reduced-price meals said that their child would be less likely to eat a school meal unless it were free for all students. Evidence from the past few years suggests that if that stigma is taken away, more kids will eat a school meal." ²⁷	Research: Impact of Massachusetts Healthy School Meals for All Policy 
8.5 Services to address basic needs insecurity addressing housing, clothing, food, and technology insecurity	Rates of food insecurity and insufficiency have risen again ²⁷ after the temporary increase in SNAP benefits ended. There is overwhelming evidence that students cannot learn effectively without having their basic needs met, and community schools ²⁸ are often best positioned to coordinate those essential supports.	
8.6 A trusted adult who understands and can advocate for their needs or process for ensuring connection to a trusted adult within their school	Strong adult-student relationships are, in many ways the foundation of student engagement and learning ²⁹ . Leading districts are committed to ensuring that every student feels connected to at least one trusted adult in their building through deploying practices that ensure relationships are not left to chance.	Toolkit: Trusted-Adult Relationship Mapping 

Inclusive and Equitable Hiring and On-Boarding Processes

Components of Best Practice	Why This Matters	Relevant Resources
9.1 Standardized interview processes and candidate evaluation criteria audited for potential concerns related to equity and racism	Establishing a well-structured, standardized interview process that demonstrates consideration of equity considerations and cultural awareness not only helps the district to avoid bias in hiring, but can also creates a positive impression for BIPOC candidates evaluating their options for employment	Article: Six Practices for Creating an Inclusive and Equitable Hiring Process 
9.2 A structured on-boarding program that provides access to resources required for success in their role	Employees who have a positive onboarding experience ³⁰ are almost 3x as likely to feel prepared and supported in their role and cross-industry research ³¹ indicates effective onboarding can increase employee retention by up to 82%. With turnover rates among BIPOC educators consistently higher than among White educators, ensuring that new teachers are set up for success will be crucial if districts are to successfully increase the share of BIPOC teachers in their schools	Guide: Seramount's Inclusive Onboarding Guide 
9.3 A formal mentor to understand and advocate for their needs and concerns	Regardless of race, "Well-designed mentoring programs improve retention rates for new teachers, as well as their attitudes, feelings of efficacy, and instructional skills" (Sutcher, et al., 2019, p. 6) ³² . However, pairing new BIPOC educators with mentors who share the same lived experiences has been central to the success of the Black Educator's Initiative ³³ , which saw 94% of program graduates stay in the profession in 2023.	
9.4 Proactive recruitment of BIPOC employees for professional roles including teaching, counseling, and administrative positions	BIPOC are underrepresented in the classroom, in the principal's office, in the central office, and in the boardroom. However, many districts have a much higher share of BIPOC hourly wage employees. Members of the METCO Racial Equity Committee specifically emphasized the need for districts to recruit BIPOC candidates for professional, salaried roles.	

Equitable, Anti-Racist Opportunities for Career Advancement

Components of Best Practice

10.1 District-sponsored forums for BIPOC educators that provide regular access to school principals and the superintendent.

10.2 Professional development opportunities provided by and designed for BIPOC educators

10.3 Formal career conversations with direct supervisors at least once per year

10.4 Defined career ladders and/or lattices to provide a clear vision of career possibilities within the district

Why This Matters

One of the most effective ways to increase retention³⁴ of BIPOC teachers is to increase the number of BIPOC in leadership positions³⁵. Those opportunities start with ensuring a connection between BIPOC and those in leadership positions today, as those connections lead to sponsorship, nominations, and nudges to apply for leadership positions when openings arise.

An important insight emerged during our interviews on this issue: BIPOC teachers want to see other BIPOC educators leading PD sessions, but not just on issues related to race and DEI. BIPOC staff need to be elevated for their work as teachers, and their expertise as professional educators celebrated as much as their experiences as people of color.

Identified by Gartner³⁶ as one of the “moments that matter” for employees in any career, career conversations help employees to reflect on where they are today, understand which opportunities they could and should explore, and feel heard by their manager and organization.

When structured effectively³⁷, career ladders and lattices provide a transparent view of career development and advancement opportunities across a district, along with the knowledge and skills required to be successful in those roles and the professional development opportunities to build those competencies. Proactively developing and communicating potential career progressions can help boost retention by combatting the perceived “flatness” of the teaching profession that frequently leads to disengagement and attrition.

Relevant Resources




Article:
What Educators of Color Say it Will Take to Boost Their Numbers in School Leadership



Research:
An overview of international educator career pathways



Access to Social and Emotional Support

Components of Best Practice	Why This Matters	Relevant Resources
11.1 Access to mental health services through district benefits including partnerships with BIPOC mental health providers	Black teachers are far more likely to report frequent job-related stress ³⁸ and burnout than White and Latina/o/x teachers. While data have shown ³⁹ that Black Americans are less likely to report symptoms of anxiety and depression, evidence suggests that mental health challenges in Black communities are also underdiagnosed ⁴⁰ , making access to mental health services even more important.	Program: Black Mental Health Alliance 
11.2 Peer support networks for community, connection and processing including protected time and space for groups to meet in schools	Peer support groups and networks help employees to process challenges in collaboration with others who are working through similar lived experiences. These groups are particularly important for BIPOC educators, who are more likely to experience discrimination and isolation ⁴¹ in the workplace.	Program: Happy Teacher Revolution 
11.3 A formal process for identifying and acting on factors affecting staff morale and wellbeing	Teacher morale has been historically low in districts across the country for the past few years, affecting not only retention but also the ability of educators to be successful in the classroom. Cross-industry research ⁴² found that successfully raising morale requires a sustained effort and using a diagnostic process for identifying and addressing the root causes of low morale in each school.	Program: Teacher Morale Momentum Loop 
11.4 Proactive communication of the support services available to staff , including prominent display in high-traffic areas and the principal's office	Through efforts to address teacher retention over the past two years, many districts have reported that their staff were not aware of many key support services included in their benefits packages (including access to mental health care providers and teletherapy). Increasing the visibility of those supports can both increase utilization and decrease frustration among staff.	

Connection and Agency Within the School and District

Components of Best Practice

Why This Matters

Relevant Resources

12.1 Direct contact with an appointed staff member who knows their child and can advocate for their child's needs

Strong parent-teacher partnerships can have a profound effect on student achievement.⁴³ However, cultivating those relationships becomes increasingly complex as students enter middle and high school. Ensuring that every family has one primary point person improves ownership and the feasibility of maintaining relationships over time.

12.2 Communication through channels that are accessible to all parents and regularly vetted for equity concerns

Communications are only effective if they reach their intended audience. As a result, districts need to ensure that channels used to distribute messages are both accessible to all families in the district and frequently used by those families. Co-developing communications practices⁴⁴ with representative community members can go a long way toward achieving this goal.

12.3 The opportunity to participate in the parents' association(s) and parent committees

BIPOC parents often report not feeling welcome⁴⁵ in traditional PTA meetings, as power dynamics with White, affluent parents can lead power dynamics have led many to be involved to parallel organizations⁴⁶ with different agendas.

12.4 Policies to ensure inclusive behaviors and practices in parents' associations and parent committees

Power dynamics with White, affluent parents and differences in priorities can lead those from disadvantaged groups to feel as though their issues fall to the bottom of the list. To prevent this situation, administrators should work with parents to build shared leadership⁴⁷ structures that promote inclusion and effective collaboration.


Article:
Making Connections
With Advisory



Article:
What is
Equity-Based
Communications



Ways to Support Their Child at School Meetings and Events

Components of Best Practice	Why This Matters	Relevant Resources
13.1 Accessible scheduling of essential meetings and events where the timing is within the school or district's control	<p>Black workers are significantly more likely than all workers to work a non-daytime schedule,⁴⁸ increasing the likelihood that they cannot attend events outside the school day. There will never be a perfect time to run school events, but gathering input (i.e., polling) on which dates and times are viable for school families enables schools to make informed choices that maximize attendance.</p>	<p>Research: Reconsidering Parental Involvement: Implications for Black Parents</p> 
13.2 Transportation options for essential meetings such as parent/teacher conferences	<p>As previously stated, Black households are less likely to have access to a personal vehicle,²³ creating potential barriers to attendance and participation in school events. While providing parent transportation to all events is likely not viable for any district, providing options for key events such as parent/teacher conferences can make participation possible for disadvantaged parents when it matters most.</p>	
13.3 Alternative options for participating in/attending meetings and events including live-streams and recorded media	<p>Where transportation is not an option, alternative options (such as Zoom) enable parents to stay informed, support their children, and participate in discussion-based events. However, it is worth noting that this is still contingent on equitable access to technology and attendance rates can still be challenging to sustain.⁴⁹</p>	
13.4 Proactive communication of upcoming meetings and events that involve parents/family/caregiver attendance and participation	<p>Parent involvement in school activities⁵⁰ is tied to higher grades and test scores, regular school attendance, and better social skills. Proactive communication of upcoming events is essential for maximizing attendance and engagement in school events and is called out here to prevent this component of best practice from being overlooked.</p>	

SECTION 2

Examples of Excellence

Real-World Practices That Align with the Blueprint for METCO

Section Contents: Examples of Excellence

About the Examples of Excellence. 29

How to Read This Section 30

The Equity Strategic Plan (Westwood Public Schools) 31

Report on Efforts to Reduce Systemic Barriers to Equity (Lexington Public Schools). 32

Racial Equity Analysis Protocol (Jefferson County Public Schools)33

The REAL Coalition (Needham Public Schools) 34

Reserved Seats on the School Committee (Concord and Concord Carlisle Schools) 35

Two Approaches to Advancing Culturally Responsive Instruction (Newton Public Schools 36

The Calculus Project (Public Schools of Brookline) 37

Culturally Relevant Education (Weston Public Schools) 38

Let’s Talk About Race, Culture, and Equity (Westwood Public Schools). 39

Increasing BIPOC Enrollment in Advanced Coursework (Natick Public Schools) 40

Success-Focused College Counseling (District of Columbia Public Schools). 41

BIPOC Staff and Administrator Affinity Groups (Newton Public Schools). 42

The Welcome Club (Westwood Public Schools) 43

Family Communication and Engagement Measurables (Lincoln-Sudbury Regional School District) 44

About Our Examples of Excellence



In this section of the report, we have profiled 15 “Examples of Excellence.”

These *Examples of Excellence* are real-world practices and initiatives that align with components of the Blueprint. Most were sourced through interviews with leaders from METCO partner districts from May through August 2023. However, a couple of these examples come from interviews with leaders from districts in other regions or states. We hope that those external examples inspire METCO districts to search beyond Massachusetts for best practices that fill gaps in the strategies being deployed across METCO today.

In this report, we have provided brief descriptions of each Example of Excellence, noting the aspects that align with best practice. Where possible, examples are also accompanied by links to sites or resources that provide additional information. You can find those links in the blue bars at the bottom of each page.

This library needs to grow – and we need your help.

These profiled practices by no means represent the sum of innovative work being done to advance Racial Equity and Integration by METCO districts. We have seen and heard of many more examples that could be added to this research. However, for the purposes of this report, those included are selected based on three factors:

1. They were shared during our interview process.
We have not included items that were not described by district leaders during those calls.
2. They directly align with at least one of our 13 commitments..
It should be easy to see how each practice aligns with the Blueprint.
3. They benefit all BIPOC students, employees, and families (and non-BIPOC stakeholders).
Our mandate was not to profile practices focused solely on supporting students from Boston.

Our vision is that these *Examples of Excellence* will form the beginning of a shared library of practices in place across METCO. To support that objective, we will establish a process for submitting and gathering new *Examples of Excellence* following the publication of this report.

How to Read This Section: Examples of Excellence

See Pages 28-41

Practice title and area of alignment with the Blueprint Framework



Indication of a METCO partner district.
METCO logo indicates that this is an example of excellence sourced from one of the 30 METCO partner districts



Description of the practice.
Sourced through interviews and information published by the district online.



Links to publicly available documents
to enable further exploration of a district's innovative work (full website addresses can also be found at the end of this report)

The Equity Strategic Plan

Blueprint Alignment: A Structural Commitment to Racial Equity and Integration



Wellesley Public Schools' Equity Strategic Plan (2020-2025) provides a comprehensive roadmap for how the district will address disparities and advance equitable practices and was developed following the completion of the Wellesley Public Schools SCORE Analysis and Racial Climate Survey (2017).

There are several elements that align with our analysis of best practices for developing strategic plans focused on advancing equity:

1. The plan begins with a mission statement for Diversity, Equity, and Inclusion across the district. That mission statement defines the values and behaviors that will guide the district's work to "welcome, celebrate, and affirm the full spectrum and intersections of human differences in, and beyond, [the Wellesley] community."
2. The plan provides a summary of where the district is today. This section uses data to communicate and quotes to communicate both "bright spots" to celebrate and the challenges that the district needs to overcome.
3. The plan clarifies specific goals that address injustices experienced by BIPOC students, staff, and community members, along with the actions the district will take to achieve those goals.
4. The plan clarifies how the district will measure progress on each goal. These "progress markers" paint a clear vision for how the district will look different in 2025 than it does today.

See how Wellesley integrated these components of best practice into their strategic plan document and the goals they have defined as a district at the link below.



Read Wellesley's **Equity Strategic Plan 2020-2025**



Report on Efforts to Reduce Systemic Barriers to Equity

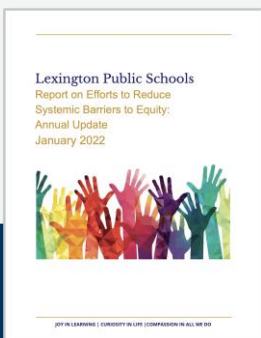
Blueprint Alignment: A Structural Commitment to Racial Equity and Integration



Lexington Public Schools' Report on Efforts to Reduce Systemic Barriers to Equity is a comprehensive account of Lexington's ongoing efforts to identify and dismantle equity barriers across the district. The report begins with grounding readers in the district's vision statement and Goal #1 of the strategic plan (Address and Narrow Equity Gaps), making the report accessible by clarifying specific terminology and definitions, and communicating that the report will provide an update on progress that the district is making toward five priorities: Ensuring a Diverse Workforce; Ensuring Equitable Access to a Diverse, Rigorous Curriculum Reflecting Our Vision and Values; Ensuring Inclusion in the General Education Learning Environment; Addressing Disproportionate Use of Suspension and Student Discipline; and Ensuring Progress Toward Our "We All Belong" Core Value.

The report provides detailed but succinct descriptions of initiatives that align with each of the priorities listed, with data on implementation and outcomes included (where appropriate) throughout. Notably, the report also provides contextual data that clarifies how progress at Lexington Public Schools compares with other communities and the state of Massachusetts.

We are profiling this report because we (EAB) have rarely seen a more comprehensive and specific yet understandable report detailing a district's progress toward equity-related objectives. While the length and depth of this document may be more than many districts have the resources to replicate, the report's structure, content, and tone provide a reference point for excellence that any district can build from.



Read Lexington's [Report on Efforts to Reduce Systemic Barriers to Equity](#)



Racial Equity Analysis Protocol

Blueprint Alignment: A Structural Commitment to Racial Equity and Integration



The Racial Equity Analysis Protocol (REAP) is a tool and systematic process used to evaluate every decision, policy, and practice that impacts students at Jefferson County Public Schools (KY) with an equity lens.

The REAP process is designed to be conducted by teams of at least three individuals – ideally representing multiple perspectives. In addition, guidelines state that a facilitator should be employed to guide the team through the process when possible, and that data should be used throughout the REAP process to prevent decisions from being rooted in assumptions.

While the REAP process can be conducted virtually through a shared document, Jefferson County administrators advise that the process is most effective and valuable when they encourage live dialogue and courageous conversations. When appropriate, the team conducting the REAP assessment should create an action plan for who will follow up to address areas in need of improvement (and how) before closing the process.

Learn more about Jefferson County's **Racial Equity Analysis Protocol**



The REAL Coalition

Blueprint Alignment: Voice and Representation in School and District Decisions



Needham Public Schools' REAL Coalition “provides leadership and guidance on eliminating barriers to racial equity and supporting the advancement of all learners in the Needham Public Schools. As ambassadors for Race, Equity, Access, and Leadership, the Coalition is committed to engaging staff, students, families, and community members in conversations and actions that promote equitable practices for all in [the Needham] community.”

The Coalition includes more than fifty students, parents, community members, and teachers, who collectively serve as representatives of a diverse array of identities and demographic groups from across the district. The REAL Coalition’s work is facilitated by a steering committee of senior district administrators, and the group was originally formed to answer a set of essential questions that surfaced through the district’s 2018 Equity Audit Report.

Today, the REAL Coalition meets several times per year to discuss district progress toward prioritized goals and deepen members' understanding of issues related to race, equity, and access as a leadership group. The group holds themselves accountable through district and school improvement plans continues to report to the School Committee and the community on progress through publications such as the “Let’s Get Real” newsletter.”

The May 2023 Edition of “Let’s Get Real” provides concise and transparent updates on six “goal areas” for the district: Policies and Practices; Hiring and Employment; Curriculum and Instruction; Professional Learning; Climate and Culture; and Communication and Engagement.

In summary, the REAL Coalition represents several elements of best practice. Most notably, a process for gathering community input on district policies and practices, and transparent reporting on progress toward equity-related goals.



Read Needham’s “Let’s Get Real” Newsletter



Reserved Seats on the School Committee

Blueprint Alignment: Voice and Representation in School and District Decisions



Concord and Concord-Carlisle Public Schools established two non-voting representative positions for METCO parents on the school committee to ensure the voices of the METCO community stakeholders were heard when making district-level decisions. They chose to have two seats on the school committee because there are two district schools, one for grades K-8 (Concord) and the other for grades 9-12 (Concord-Carlisle), ensuring each school is represented by a METCO parent representative.

When implementing this policy, one problem arose: town policies required school committee members to reside in Concord-Carlisle. Therefore, the decision was made to establish non-voting seats - which was approved. However, the subcommittee responsible for writing the policy worked to ensure that METCO representatives would be actively engaged in the decision-making process.

Once the policy to reserve two non-voting seats had been approved, the two representatives were selected through a METCO Parent and Teacher Group (METCO PTG) election, which will be repeated biannually.

In addition, the Concord-Carlisle School Committee has expanded the locations used for school committee meetings to be more inclusive of the Boston community and moved to a hybrid (Zoom-enabled) format. These changes have significantly increased access to school committee discussions for both Boston and Concord-Carlisle residents.

Given that many districts likely operate with similar requirements for residency among voting members of the school-committee, Concord-Carlisle's approach presents an innovative model for other districts to build from or replicate.

Two Approaches to Advancing Culturally Responsive Instruction

Blueprint Alignment: Representative and Inclusive Classroom Pedagogy



The Literacy Equity Project

A cohort of first-grade teachers, literacy specialists, and interventionists at Newton Public Schools participated in a year-long professional development community called the Literacy Equity Project. Their work, funded by the district's DEI department, studied culturally responsive reading instruction and best practices for teaching BIPOC students to read, then put those ideas into practice using multiple, data-based cycles of inquiry.

Data demonstrates that students who were below grade level and then received instruction through the program grew in reading proficiency at a faster rate than those students not yet enrolled in the program.

Culturally Responsive Instruction Observation Protocol

Newton Public Schools also leverages the Culturally Responsive Instruction Observation Protocol as a systematic process for operationalizing culturally responsive instruction across their schools. The tool, originally developed by researchers from multiple universities, is designed to guide practitioners in their development as culturally responsive educators, and to provide principals and coaches with a tactical tool for both observing instruction and supporting teacher development.

One of the strengths of CRIOP is its holistic approach, prompting educators to address five distinct elements: Classroom Relationships, Family Collaboration, Assessment Practices, Instructional Practices, and Discourse. The tool provides examples of what responsive and non-responsive classrooms look like and ask users to rate alignment from “never” to “consistently.” Scores for each category help educators to prioritize where to focus efforts for improvement.



Learn more about the **Culturally Responsive Instruction Observation Protocol**



The Calculus Project

Blueprint Alignment: Representative and Inclusive Classroom Pedagogy

PUBLIC SCHOOLS of
BROOKLINE

The Calculus Project was designed by a team of teachers and school leaders at Brookline High, led by Dean of Students Dr. Adrian B. Mims, in response to the history of underachievement in mathematics by African-American, Latino, and low-income students. The core “district program” aims to increase the number of these students who enroll and succeed in high-level mathematics courses, culminating with the study of calculus in their senior year. The program is comprised of five components:¹

- Summer Academy, in which rising 8th through 12th graders are “pre-taught some of the upcoming year’s math”
- Academic Center, which provides tutoring support throughout the school year from math teachers and TCP Peer Teachers” (see Peer Teaching)
- Student Cohorts, in which students are grouped into designated sections to drive continued collaboration and a sense of belonging.
- Peer teaching, in which Junior and Senior TCP scholars can become paid Peer Teachers for the Summer Academy and Academic Center
- PRIDE Curriculum, through which students learn about the accomplishments of STEM professionals of color during Summer Academy and the Academic Center

Through the components listed above, the Calculus Project directly addresses both the instructional and societal barriers that prevent many students from realizing their potential in the math classroom and STEM-related careers. Perhaps most importantly, data show that the program works: The three original TCP districts have more than doubled their number of Black and Hispanic AP students, and nearly 80% earned an A or B in their first semester after the summer acceleration program while fewer than 1% failed their fall semester math class (2022).



Learn more about [The Calculus Project](#)



Culturally Relevant Education Team

Blueprint Alignment: Representative and Inclusive Classroom Pedagogy



The Culturally Relevant Education (CRE) Team serves as the central DEI working group for Weston Public Schools across the entire district.

Comprised of volunteer teachers and staff, the CRE team works with Weston's DEI director to design, develop, and lead professional development workshops for each school. The workshops they have developed cover topics ranging from how to understand your own implicit biases or microaggressions to multicultural math lessons, and CRE team members are encouraged to customize the content for the specific needs of each school community.

Sessions are delivered monthly, but principals can choose when different content should be delivered. The team maintains a central content hub so that each representative can choose the material that would be most beneficial to their school. The CRE team also convenes at a central location several times a year to discuss progress and develop new content.

We are profiling the CRE team approach as a creative way to establish a sustainable program for DEI-related professional development across a district, while also providing teachers with ownership and agency within the work.

Let's Talk About Race, Culture, and Equity

Blueprint Alignment: An Inclusive, Anti-Racist School Environment



Let's Talk About Race Culture Equity (LTARCE) is a student leadership group focused on culture and climate at Westwood High School. LTARCE aims to promote open discussions and understanding about race, ethnicity, and culture among students. LTARCE leaders hold a yearly full-day retreat for other students to teach them about different terms, engage in meaningful conversations about race, and explore its significance in their lives. LTARCE members also conduct training sessions for middle school students and take an active role in community engagement. They lead community discussions, invite speakers, and moderate panels at events such as Westwood's Juneteenth celebration. The program continues to evolve, with plans to conduct elementary family presentations and form additional groups to teach and inspire younger students.

Student voice and agency has consistently proven to be the most important ingredient for effective social and emotional learning in middle and high school settings. LTARCE places students at the center of an engaging program that equips the broader Westwood community to talk about race, culture, and equity in today's increasingly complex world.

Increasing BIPOC Enrollment in Advanced Coursework



Blueprint Alignment: Personalized Support for Academic and Post-Secondary Success



The METCO team at Natick Public Schools strives to place all students of color in at least one higher-level class during their high-school tenure.

At the beginning of each school year, Natick's METCO director emails 8th-grade teachers to communicate the district's goal of engaging METCO students, students of color, and English Language Learners in higher-level courses, along with expectations for Grade 8 teachers to support that goal.

During the year, the METCO Middle School Coordinator analyzes student data to track student progress toward higher-level coursework, identifies skill areas in which students need additional support to stay on track, and provides students with additional resources or tutoring to help address those needs.

At year-end, the middle school METCO team meets with Grade 8 teachers and guidance counselors to discuss Grade 9 course recommendations for each student. The METCO Director then meets with the high school guidance counselors to review course recommendations and discuss any concerns. Throughout the following year, the high school METCO team continues to monitor student progress and performance to provide continued, targeted support for students and guide future course decisions.

It has been well documented that lower expectations for students of color contribute to fewer students of color enrolling in advanced coursework in comparison with their Caucasian peers. Natick's strategy presents a practical playbook for addressing that challenge as students make the pivotal transition from middle school to the high-school environment.

Success-Focused College Counseling

Blueprint Alignment: Personalized Support for Academic and Post-Secondary Success



For many aspiring college students, especially those who would be “first-generation,” choosing which college to attend can be a daunting proposition. The number of institutions has risen dramatically over the past couple of decades, making it harder and harder for students to find the right school. Poor choices can carry big costs. In 2022, the overall six-year graduation rate for US colleges and universities was a dismal 54.8% (National Student Clearinghouse Research Center), but those numbers are significantly lower for “first-gen” students and vary further by type of institution. In addition, while the selectivity of a school tends to have a positive correlation with persistence and graduation rates, that trend does not always hold true – especially for students of color.

District of Columbia Public Schools decided to make smart post-secondary choices easier by monitoring affordability and graduation rates at the schools most commonly attended by their students. Using data from the National Student Clearinghouse, historical financial aid data (gathered from past DCPS students), and information from MyCollegeFactFinder, the college counseling team established a list of schools that would be a “smart choice” for their students. They then encouraged students to apply to these schools, encouraged trips to those campuses, and contacted the schools directly to form institutional partnerships. They also established a list of “strong caution” schools which students were discouraged from applying to, college trips were not funding, and college representatives were not invited to recruit on campus.

This initiative has not only increased enrollment of DCPS students at “Smart College Choices,” it has influenced the behaviors of higher ed institutions. “Our short-term gain, in terms of enrollment at “Smart College Choices” colleges, has been significant. We’ve also seen colleges who have expanded scholarship programs for DC students and colleges with lower grad rates that have started to put more supports in place—the campaign is not only changing the behavior of students, but colleges too!”

~ Kimberley Hanauer, Former Director of College Preparedness, DCPS.



Learn how to implement **Success-Focused College Counseling**



BIPOC Staff and Administrator Affinity Groups

Blueprint Alignment: Access to Social and Emotional Support



Newton Public Schools (NPS) conducted a district evaluation of hiring and retention data, which revealed a lower-than-average retention rate for BIPOC staff in the district. In response, NPS created BIPOC Staff & Admin Affinity Groups to foster a greater sense of community among BIPOC staff and reduce feelings of isolation - a key issue that surfaced through their evaluation.

Each NPS school offers at least one BIPOC affinity group, each with the mandate to create space for BIPOC staff to both informally and formally connect, share experiences, and discuss ideas. Bi-monthly meetings are held after school (either via Zoom or in-person), and the groups participate in district-wide events held at the beginning and end of the school year. NPS also holds a space for BIPOC Administrators to meet twice a year.

To launch these groups, Newton's DEI director identified and partnered with school-based coordinators to manage the events and build awareness of the groups through multi-modal communications (staff meetings, email blasts, word of mouth etc.) The DEI director provided guidance and objectives to the school-based coordinators for affinity group meetings and events.

Benefits of this initiative include enabling BIPOC with similar responsibilities and challenges to meet and build relationships, creating safe spaces for BIPOC staff to discuss daily challenges related to microaggressions and racism, and developing networking and mentorship opportunities that support the career advancement of BIPOC employees.

The Welcome Club

Blueprint Alignment: Connection and Agency Within the School and District Community



Westwood's Welcome Club exists to foster friendships and create long-term connections between families of students at Westwood – connecting new families with "veteran WPS" families and families from Boston with Westwood residents.

Welcome Club programming includes pairing families up with "buddy families," family events, and events that are just for parents throughout the year. Event activities have included storytelling, snowshoeing, game nights, and more. Families are also encouraged to bring their support teams, such as grandparents and family friends.

One of the recent parents-only events involved a presentation from an expert speaker on "How to Talk to Your Middle Schooler About Race," in recognition that cross-racial relationships may be a new experience for some families as they enter the district. High school students joined the guest speaker to share their experiences and perspectives, providing valuable insights into how parents can effectively approach race-related conversations with their children.

In summary, the Welcome Club is a great example of a program that embodies multiple components of best practice; from building parent connections and engagement through to educating parents on how to talk about race with their child.

Learn more about the [Welcome Club](#)



Family Communication and Engagement Measurables

Blueprint Alignment: Connection and Agency Within the School and District Community



Administrators at Lincoln-Sudbury identified teacher-parent communication as an area in need of greater consistency and improvement. In response, they created a framework and measurable goals for teacher-parent communications across the district, addressing issues including frequency of communications and topics that should be covered across the year.

To develop the framework and goals, a working group, (consisting of district leaders and teacher leaders who had been recognized for excellence in teacher-family communications within their schools) convened several times to discuss relevant research and resources and progress and establish a set of targets for improving the quality of interactions that involve a student's parent(s), guardians, or family members.

During the development phase, they also gathered guidance from Harvard Graduate School of Education (through a guest speaker) and DESE (through webinars on the Dual Capacity-Building Framework for Family-School Partnerships). The team used information gleaned from those presentations – alongside supplementary research - to establish goals and metrics that matched the identified needs in their schools.

Once established, the goals and measurable indicators were shared with all teachers and staff to ensure that everyone was aware of the district's expectations and objectives for effective communication and family engagement.

We are profiling this Example of Excellence because clarifying desired practices and outcomes for engaging and communicating with families is essential for building and sustaining consistent, inclusive practices across a district.

SECTION 3

2023 Blueprint Alignment Survey Results

How METCO Districts Rate Their Current Alignment With Blueprint Components Today

Section Contents: 2023 Blueprint Alignment Survey Results

Introduction to the 2023 Blueprint Alignment Survey Results47

How to Read This Section.48

Commitments to All Stakeholders49

Commitments to All Students52

Commitments to All Employees58

Commitments to All Families 61

Introduction to The Blueprint of METCO Alignment Survey and Results



The 2023 Blueprint for METCO Alignment Survey was designed to accomplish two goals: First, to gain an understanding of the overall strengths and weaknesses of the METCO partnership with regard to each of the Blueprint commitments and components of best practice. Second, to enable each individual district to reflect on how they currently align with the Blueprint and identify opportunities for improvement.

We asked participants from each district to review each *Component* of the Blueprint and determine the extent to which their district met each criteria (see example below).

Survey Question Example:

Does your district provide all students with:

- *Inclusive, anti-racist curricula that reflect and build understanding of diverse communities and cultures?*

- a. *Yes, district-wide*
- b. *In some schools*
- c. *Not yet present in our district*
- d. *Not sure*

Because we received a varying number of responses from each district, we created a “snapshot of the partnership” by categorizing each district’s alignment with best practice based on the criteria below:

How we categorized districts based on collective responses from each leadership team:



70%+ of district respondents reported “yes, district-wide”



Some indicated “present in some schools,” but fewer than 70% said district-wide



All district respondents said either “not yet present in our district” or “not sure”

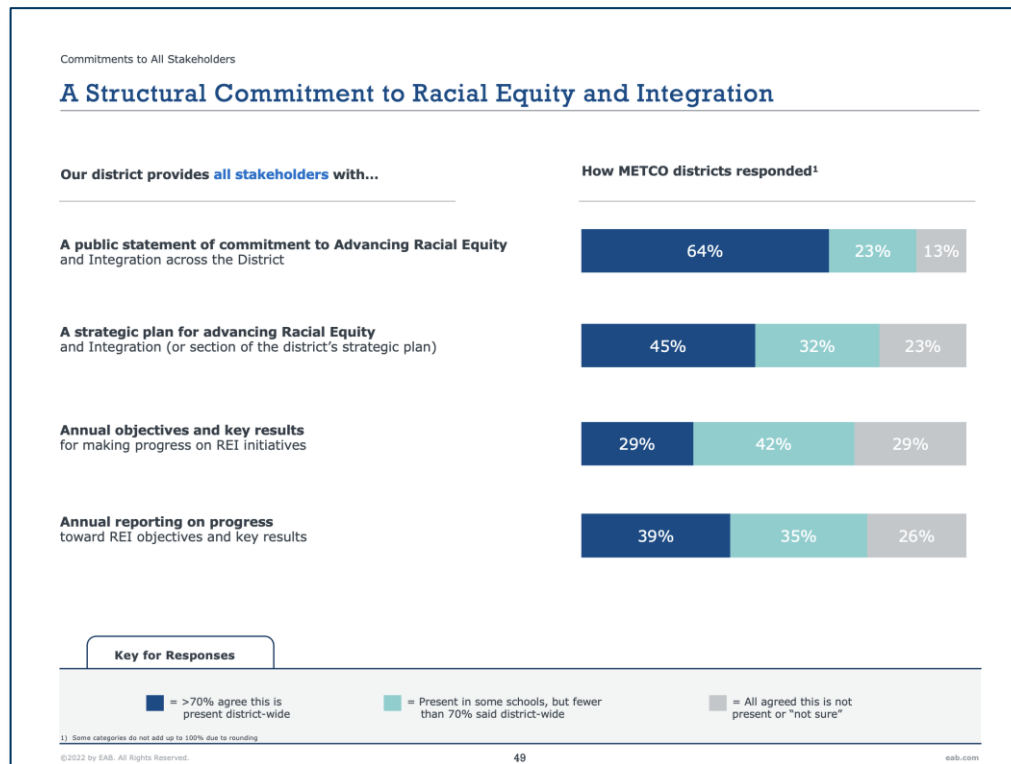
This categorization formula enabled us to provide the most accurate picture possible of overall strengths and weaknesses across the partnership. Districts with a larger number of respondents included school principals who are less likely to be aware of practices being in place district-wide, so we used a 70% threshold to account for predictable blind spots.

How to Read This Section: Blueprint Survey Results

See Pages 45-58

Blueprint commitment and relevant stakeholder group.

These criteria apply to *all* students, employees, and families. However, when answering the survey, districts should consider whether they meet these criteria for BIPOC individuals






Key for responses. Shows how we categorized districts based on the sum of responses from each leadership team.

Summary of responses.

These bar charts show the percentage of METCO districts (n=31) that matched to each category.



How we categorized districts based on responses to each item on the survey

-  = 70%+ of respondents from a district reported "yes, district-wide"
-  = At least one team district respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"
-  = All respondents from a district said either "not yet present in our district" or "not sure"

A Structural Commitment to Racial Equity and Integration

Our district provides **all stakeholders** with...

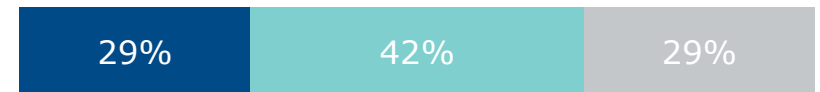
A public statement of commitment to Advancing Racial Equity
and Integration across the District

A strategic plan for advancing Racial Equity
and Integration (or section of the district's strategic plan)

Annual objectives and key results
for making progress on REI initiatives


Annual reporting on progress
toward REI objectives and key results


How METCO districts responded¹




Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:

 = 70%+ of respondents reported "yes, district-wide"

 = At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"

 = All respondents said either "not yet present in our district" or "not sure"

1) Some categories do not add up to 100% due to rounding

A Structural Commitment to Racial Equity and Integration (Continued)

Our district provides **all stakeholders** with...

A formal policy of evaluating district practices and policies
for racial equity concerns

How METCO districts responded¹



A formally adopted tool for evaluating policies and practices with a racial equity lens



Dedicated administrators for racial equity and integration



Protected budget for REI initiatives



Oversight of spending from the REI budget
by the district's lead administrator for REI



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:



= 70%+ of respondents
reported "yes, district-wide"



= At least one respondent indicated "present in some
schools," but fewer than 70% said "yes, district-wide"



= All respondents said either "not yet
present in our district" or "not sure"

1) Some categories do not add up to 100% due to rounding

Voice and Representation in District Decisions

And Ongoing Education About Racism, Equity, and Integration in Schools

Our district provides **all stakeholders** with...

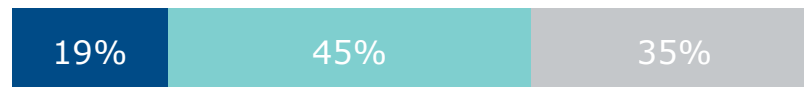
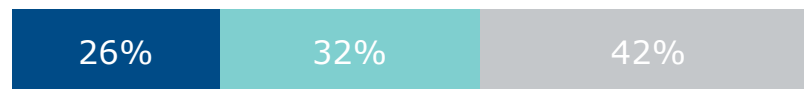
A process for gathering input on equity implications
for district policies and decisions

BIPOC representation on school and district governing bodies
(administration and school board)

Prominent display and distribution of materials
designed to equip students, families, and staff to talk
about and take action against racism

Programming and events designed to equip students,
families, and staff to talk about and take action against racism

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:



= 70%+ of respondents
reported "yes, district-wide"



= At least one respondent indicated "present in some
schools," but fewer than 70% said "yes, district-wide"



= All respondents said either "not yet
present in our district" or "not sure"

1) Some categories do not add up to 100% due to rounding

Representative and Inclusive Classroom Pedagogy

Our district provides **all students** with...

Inclusive, anti-racist curricula that reflect and build understanding of diverse communities and cultures

Teachers who have been trained to recognize and remove bias from their language and behaviors

Grading policies that have been audited for equity concerns

Instruction from BIPOC teachers and staff who represent a diverse array of cultural identities

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:



= 70%+ of respondents reported "yes, district-wide"



= At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"



= All respondents said either "not yet present in our district" or "not sure"

¹) Some categories do not add up to 100% due to rounding

An Inclusive, Anti-Racist School Environment

Our district provides all students with...

Training on how to recognize and address implicit bias and racist language/actions

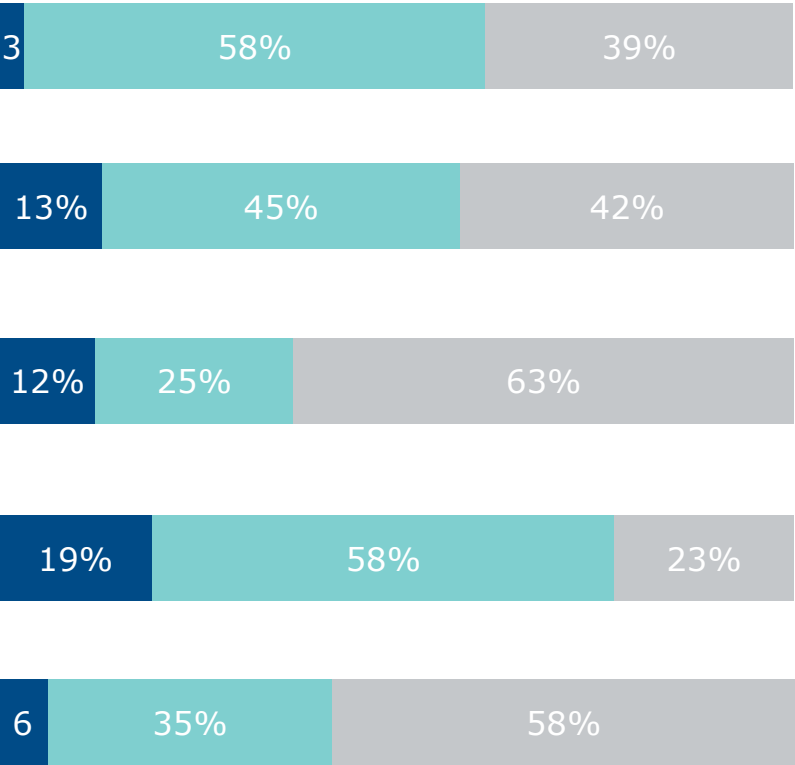
Visual representations that value diverse cultures and identities and cause no harm through racist association

Staff trained in healing-centered perspectives of student behavior to enable restorative rather than harmful interactions

Written expectations for inclusive and respectful behavior for both students and staff

Written expectations for anti-racist responses to student behavior from administrators, teachers, and staff

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:



= 70%+ of respondents reported "yes, district-wide"



= At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"



= All respondents said either "not yet present in our district" or "not sure"

1) Some categories do not add up to 100% due to rounding

Equal Inclusion in Extra-Curricular Activities

Our district provides **all students** with...

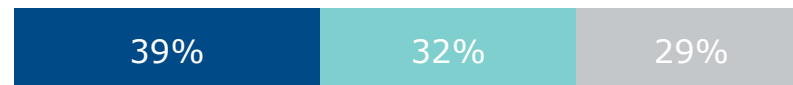
Proactive recruitment of BIPOC students for clubs, sports, and arts activities that intentionally counteract historical inequities and stereotypes

Coaches and directors who have been trained to recognize and address implicit bias and racist language/actions

Equitable scheduling for extra-curricular offerings, ensuring that student participation is not limited by conflicting requirements


Access to transportation to and from activities and events that occur outside the school day (i.e., a late bus)


How METCO districts responded¹




Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:

 = 70%+ of respondents reported "yes, district-wide"

 = At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"

 = All respondents said either "not yet present in our district" or "not sure"

¹) Some categories do not add up to 100% due to rounding

Personalized Support for Academic and Postsecondary Success (Pt.1)

Our district provides **all students** with...

Defined on-ramps to grade-level work, specifying what a student needs to master and how they will get there

Skills-based grouping for foundational skills development in core subjects of English and Math

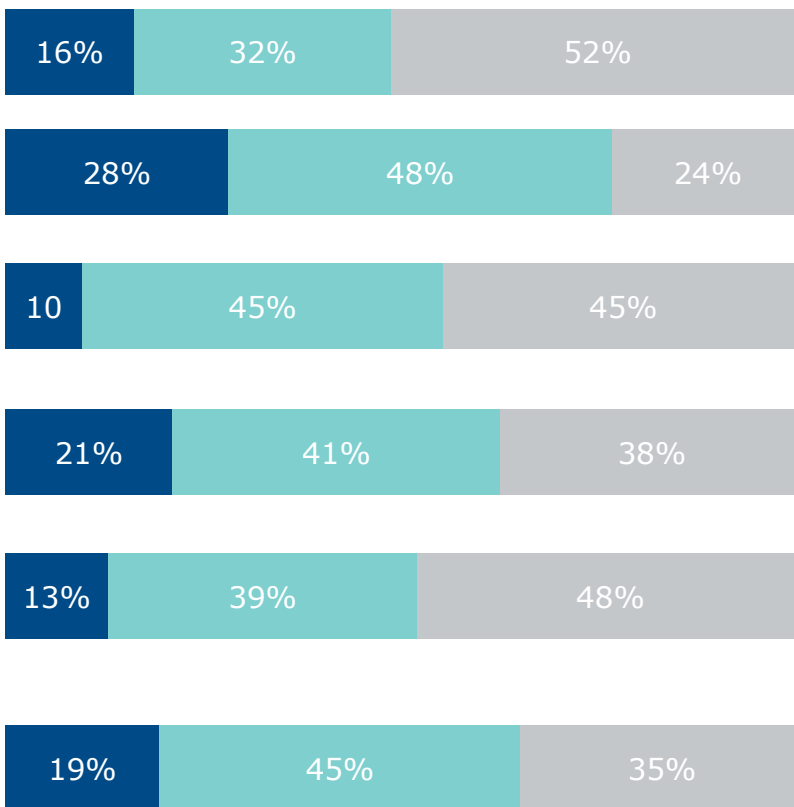
Proactive placement in higher-level coursework (i.e., Advanced Placement courses)

High expectations for student achievement from teachers and staff that are defined and reinforced across the district

Data-driven college application guidance to ensure students attend institutions with a track record of support success

College application and FAFSA completion support to ensure paperwork and complex processes do not prevent college enrollment

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:



= 70%+ of respondents reported "yes, district-wide"



= At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"



= All respondents said either "not yet present in our district" or "not sure"

1) Some categories do not add up to 100% due to rounding

Personalized Support for Academic and Postsecondary Success (Pt.2)

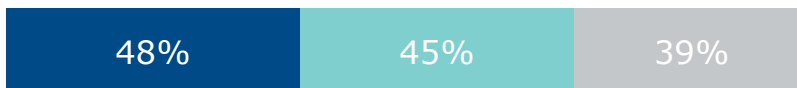
Our district provides **all students** with...

Exposure to a broad array of career possibilities
and career programming designed to counteract historical stereotypes

Support to align course selections with college and career aspirations, ensuring that have access to pre-requisite courses

Access to internship opportunities and work-based learning
that reflects students' career aspirations and interests

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:



= 70%+ of respondents
reported "yes, district-wide"



= At least one respondent indicated "present in some
schools," but fewer than 70% said "yes, district-wide"



= All respondents said either "not yet
present in our district" or "not sure"

¹) Some categories do not add up to 100% due to rounding

Basic Needs Support and Wraparound Services

Our district provides **all students** with...

Transportation options to and from school
including extended hours

Mental health services provided within their school
including access to BIPOC counselors and support staff

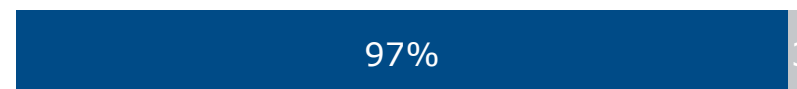
Physical health services provided within their school
including access to BIPOC physicians and school health staff

Free meals and nutrition within the school day
regardless of socio-economic status

Services to address basic needs insecurity
addressing housing, clothing, food, and technology insecurity

A trusted adult who understands and can advocate for their needs
or process for ensuring connection to a trusted adult within their school

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:

■ = 70%+ of respondents reported "yes, district-wide"

■ = At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"

■ = All respondents said either "not yet present in our district" or "not sure"

1) Some categories do not add up to 100% due to rounding

Inclusive and Equitable Hiring and On-Boarding Process

Our district provides **all employees** with...

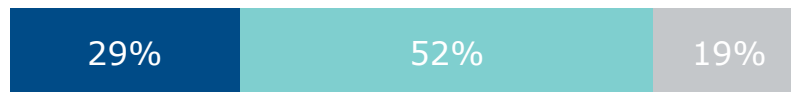
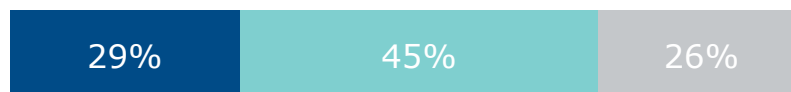
Standardized interview processes and candidate evaluation criteria audited for potential concerns related to equity and racism

A structured on-boarding program that provides access to resources required for success in their role

A formal mentor to understand and advocate for their needs and concerns

Proactive recruitment of BIPOC employees for professional roles including teaching, counseling, and administrative positions

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:



= 70%+ of respondents reported "yes, district-wide"



= At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"



= All respondents said either "not yet present in our district" or "not sure"

1) Some categories do not add up to 100% due to rounding

Equitable, Anti-Racist Support for Career Advancement

Our district provides **all employees** with...

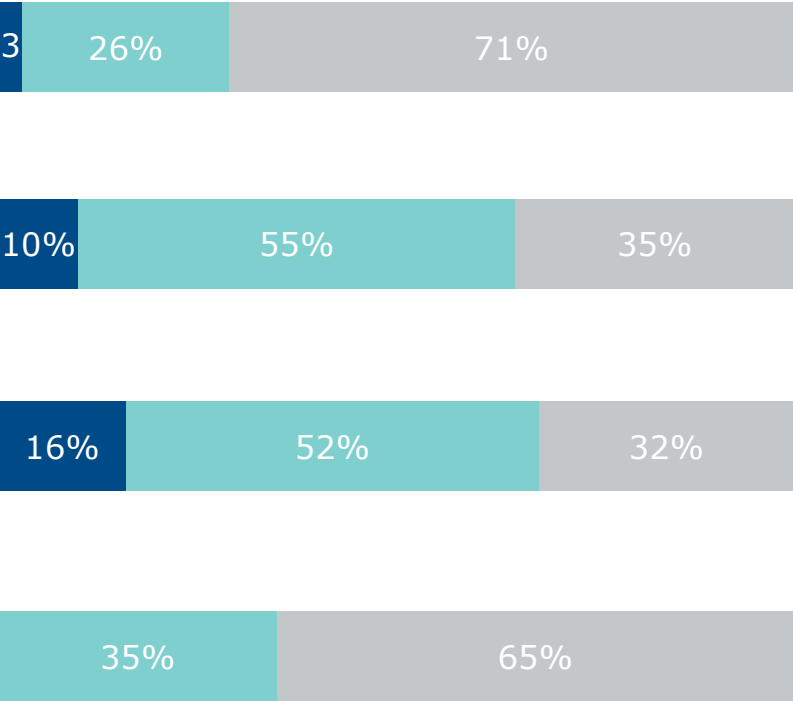
District-sponsored forums for BIPOC educators that provide regular access to school principals and the superintendent

Professional development opportunities provided by and designed for BIPOC educators

Formal career conversations with direct supervisors at least once per year

Defined career ladders and/or lattices to provide a clear vision of career possibilities within the district

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:

= 70%+ of respondents reported "yes, district-wide"

= At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"

= All respondents said either "not yet present in our district" or "not sure"

1) Some categories do not add up to 100% due to rounding

Access to Social and Emotional Support

Our district provides all employees with...

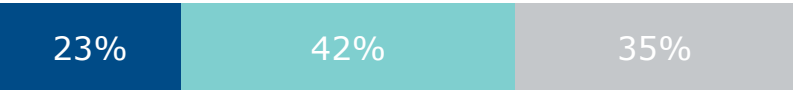
Access to mental health services through district benefits including partnerships with BIPOC mental health providers

Peer support networks for community, connection, and processing including protected time and space for groups to meet in schools

A formal process for identifying and acting on factors affecting staff morale and wellbeing

Proactive communication of the support services available to staff, including prominent display in high-traffic areas and the principal’s office

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:

= 70%+ of respondents reported “yes, district-wide”

= At least one respondent indicated “present in some schools,” but fewer than 70% said “yes, district-wide”

= All respondents said either “not yet present in our district” or “not sure”

1) Some categories do not add up to 100% due to rounding

Connection and Agency Within the School and District Community

Our district provides **all families** with...

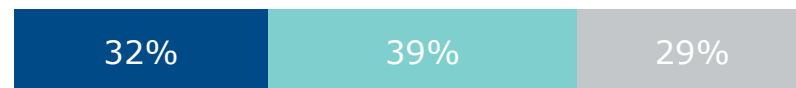
Direct contact with an appointed staff member who knows their child and can advocate for their child's needs

Communication through channels that are accessible to all parents and regularly vetted for equity concerns

The opportunity to participate in the parents' association(s) and parent committees

Policies to ensure inclusive behaviors and practices in parents' associations and parent committees

How METCO districts responded¹



Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:

■ = 70%+ of respondents reported "yes, district-wide"

■ = At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"

■ = All respondents said either "not yet present in our district" or "not sure"

¹) Some categories do not add up to 100% due to rounding

Ways to Support Their Child at School Meetings and Events

Our district provides **all families** with...

Accessible scheduling of essential meetings and events
where the timing is within the school or district's control



Transportation options for essential meetings
such as parent/teacher conferences



Alternative options for participating in/attending meetings and events including live-streams and recorded media





Proactive communication of upcoming meetings and events
that involve parents/family/caregiver attendance and participation




Key for Responses

For each criteria, bar chart segments represent the percentage of METCO districts in which:

 = 70%+ of respondents reported "yes, district-wide"

 = At least one respondent indicated "present in some schools," but fewer than 70% said "yes, district-wide"

 = All respondents said either "not yet present in our district" or "not sure"

1) Some categories do not add up to 100% due to rounding

SECTION 4

Summary and Next Steps

Recommendations for using this report to drive action in your schools

Four Initial Observations From Alignment Survey Responses



Based on the responses provided to the alignment survey, here are four key takeaways worthy of discussion:

- 1. Most districts have established strong foundations, but far fewer feel confident about meeting specific criteria for advancing racial equity.** The components of best practice most likely to be in place “district-wide” are those related to public commitments and strategic planning, along with support for basic needs such as providing free meals for all students, and proactive communication with parents. These foundations are essential, but survey results indicate that there is still a lot of work to be done to move from commitments to action and address the many specific ways in which BIPOC experience systemic racism and injustices in schools.
- 2. Strategic plans are rarely supported by protected funding and policies for advancing racial equity.** While nearly half of responding districts indicated that they have a district-wide strategic plan (or a section of the strategic plan) for advancing racial equity, just 6% indicated that their district has a protected budget for REI initiatives. While these data are likely imprecise due to inconsistent responses among leaders from each district, the size of the gap suggests the need for conversation around how districts are ensuring that equity initiatives have sufficient funding to succeed.
- 3. Individual district responses showed a wide range of opinions on which practices are in place district-wide, in some schools, or not at all.** One of the fastest ways to realize the benefits of this document will be to review the Blueprint together as a leadership team, determine which criteria you do meet district-wide today, and then raise awareness of those practices for the benefit of all community members across your district.
- 4. Every single component of best practice was indicated to be present in at least “some schools” in some districts.** This suggests that there are opportunities for shared learning on almost every issue. We’re excited to help bring those practices to the surface and help METCO partners get further, faster, on the issues that matter for BIPOC community members (and all stakeholders) in their schools.

Recommended Next Steps for METCO Partner Districts

Build Consensus, Share Success Stories, and Commit to Progress



The Blueprint for METCO was created to help METCO partner districts work together toward a unified vision for just, equitable, and integrated schools, and to turn commitments into action by providing a detailed view of what those commitments should look like in practice.

Based on our conversations with METCO partner districts and the results of the 2023 Blueprint Alignment Survey, we offer three recommendations for moving this work forward in your schools:

- 1. Establish a unified view of how your district aligns with each framework component across your leadership team.** The consistent differences in perception of district practices present in our survey results indicate that many districts may benefit from simply building awareness of the work already being done in their schools. Each district will receive a summary of their team's results in follow-up to this report to help facilitate that conversation within each leadership team.
- 2. Share your Examples of Excellence that we missed with the METCO HQ team.** By building a complete library of effective practices that align with the framework, every METCO district will have the information needed to get further, faster in this crucial work. We need your help and partnership to make that library a reality.
- 3. Take the survey each year and select 1-2 items on the framework to advance in your district annually.** We recommend doing this prior to submitting your district's METCO grant paperwork, then including a section on your area(s) of focus and associated expenses that the grant can support in that application. The Blueprint does not prescribe what to focus on first to honor that every district is in a different place on each issue with varying levels of capacity for implementing new practices. The goal is continuous progress toward a unified vision. The journey will look unique for each community.

It is an honor to serve this progressive, mission-driven partnership and help to define what it means to be METCO. EAB looks forward to helping this group continue to source and share innovative practices for advancing Racial Equity and Integration in the months and years ahead.

Endnotes: Blueprint for METCO Citations

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Endnotes: Blueprint for METCO Citations (continued)

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Links to Relevant Resources

All Stakeholders

Hallmarks of an Antiracist Institution: <https://eab.com/insights/infographic/strategy/7-hallmarks-anti-racist-education-institution-k12/>
Pitfalls to Avoid in DEI Plan Writing and Design: <https://eab.com/research/district-leadership/webinar/2021-spotlighting-pitfalls-to-avoid-2/>
Jefferson County Racial Equity Policy Expectations: <https://www.jefferson.kyschools.us/sites/default/files/Hite%20Elementary%20Racial%20Equity%20Plan.pdf>
Evaluating K-12 Policies Under a Racial Equity Lens: <https://eab.com/research/district-leadership/webinar/2020-dismantling-systemic-racism/>
Education Development Center Equity Review Framework: <https://www.edc.org/sites/default/files/uploads/Systemic%20Equity%20Review%20Framework.pdf>
How School Leaders Can Address Systemic Racism With Their Communities: <https://eab.com/insights/blogs/district-leadership/address-systemic-racism-school-district-leaders/#begin>

All Students

NYU Culturally Responsive Curriculum Scorecard: <https://steinhardt.nyu.edu/metrocenter/ejroc/services/culturally-responsive-curriculum-scorecard-toolkit>
What Makes Effective Anti-Bias Training: <https://www.gse.harvard.edu/ideas/usable-knowledge/20/03/what-makes-effective-anti-bias-training>
Equitable Grading Audit: https://attachment.eab.com/wp-content/uploads/2021/10/PDF-DLF-Equitable-Grading-Audit_8.27_FINAL.pdf
National Council for Teacher Residencies Black Educators Initiative: <https://nctresidencies.org/recruit-and-retain-black-educators/>
Extra-Curricular Participation in Kindergarten: <https://www.sciencedirect.com/science/article/abs/pii/S0193397322000673>
K-12 Curricula Prioritization Tool: <https://eab.com/research/district-leadership/resource-center/k-12-curricula-prioritization/>
Skills-Based Grouping Toolkit: https://attachment.eab.com/wp-content/uploads/2019/10/Skills-Based-Grouping-Toolkit_2019.pdf
Orange County Advanced Placement Matrix: https://attachment.eab.com/wp-content/uploads/2019/07/Closing-the-College-Access-Gap-full-study_042418.pdf#page=50
Closing the College Access Gap: https://attachment.eab.com/wp-content/uploads/2019/07/Closing-the-College-Access-Gap-full-study_042418.pdf
Success-Focused College Counseling: https://attachment.eab.com/wp-content/uploads/2019/07/Success-Focused-College-Counseling-Implementation-Guide_040618.pdf
FAFSA Submission Toolkit: <https://eab.com/services/toolkit/enrollment/fafsa-submission-toolkit/>
Meeting the Career Readiness Imperative: <https://attachment.eab.com/wp-content/uploads/2019/11/PDF-DLF-Meeting-the-Career-Readiness-Imperative.pdf>
Are Districts the Nation's Adolescent Mental Health Providers: <https://attachment.eab.com/wp-content/uploads/2020/02/PDF-DLF-Adolescent-Mental-Health.pdf>
Impact of Massachusetts Healthy Schools for All Policy: https://www.childnourishlab.org/_files/ugd/383bcd_45ee5fed8e224ffd8639f0f498086e31.pdf
Promoting Positive Adult-Student Connections: <https://attachment.eab.com/wp-content/uploads/2019/07/Promoting-Positive-Adult-Student-Connections-upload.pdf>

All Employees

6 Practices to Create Inclusive and Equitable Interview Processes: <https://www.hbs.edu/recruiting/insights-and-advice/blog/post/6-best-practices-to-creating-inclusive-and-equitable-interview-processes>
Seramont's Inclusive Onboarding Guide: <https://seramont.com/wp-content/uploads/private-proxy/47660>
What Educators of Color Say it Will Take to Boost Their Numbers in Leadership: <https://www.edweek.org/leadership/what-educators-of-color-say-it-will-take-to-boost-their-numbers-in-school-leadership/2023/01>
NCEE Career Ladders Policy Brief: <http://ncee.org/wp-content/uploads/2017/02/CareerLaddersPolicyBrief.pdf>
Black Mental Health Alliance: <https://blackmentalhealth.com>
Happy Teacher Revolution: <https://www.happyteacherrevolution.com>
Teacher Morale Momentum Loop: <https://eab.com/research/district-leadership/resource-center/teacher-morale-resource-center/>

All Families

Making Connections With Advisory: <https://www.amle.org/making-connections-with-advisory/#:~:text=The%20goal%20is%20to%20make,and%20to%20improve%20self%20Desteem.>
What is Equity-Based Communications: <https://wearedh.com/what-is-equity-based-communications-and-why-does-it-matter/>
Reconsidering Parental Involvement and Implications for Black Parents: https://wp.nyu.edu/steinhardt-appsych_opus/reconsidering-parental-involvement-implications-for-black-parents/

Links to Relevant Resources (continued)

Wellesley Public Schools: The Equity Strategic Plan: <https://drive.google.com/file/d/1IEdNCRTja0Vbn7V7HbAw4UbGrUAHWp4j/view>

Lexington Public Schools: Report on Efforts to Reduce Systemic Barriers to Equity: <https://docs.google.com/document/d/1xqTiH2zwx0G8h3lXg9TYM7dyotQy6ZpATxpER3oepxM/edit?usp=sharing>

Jefferson County Public Schools: Racial Equity Analysis Protocol: <https://www.jefferson.kyschools.us/departments/diversity-equity-poverty-division/school-based-decision-making/council-member-resources>

Needham Public Schools: Let's Get Real Newsletter: <https://drive.google.com/file/d/1NmbqBrK4IWNQTjgPrej9kVJedcuMNIkz/view>

Newton Public Schools: [Culturally Responsive Instruction Observation Protocol](#) (resource from Boston Public Schools)

Public Schools of Brookline: The Calculus Project (resource from The Calculus Project): <https://thecalculusproject.org>

District of Columbia Public Schools: Success Focused College Counseling: https://attachment.eab.com/wp-content/uploads/2019/07/Success-Focused-College-Counseling-Implementation-Guide_040618.pdf

Westwood Public Schools: The Welcome Club: <https://sites.google.com/view/welcome-club/home?authuser=0>



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At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.

ITEM TITLE: METCO 2.0 - Rasheedah Clayton/METCO Director
DATE:
ITEM TYPE:
ITEM SUMMARY: LINK - A Vision for METCO 2.0
BACKGROUND INFORMATION:
RECOMMENDATION:

ITEM TITLE: MSBA SOI for Memorial School (including preschool classrooms) - Matt Gillis /Assist Superintendent for Finance

DATE:

ITEM TYPE:

ITEM SUMMARY: LINK - MSBA draft
LINK - MSBA memo

BACKGROUND

INFORMATION:

RECOMMENDATION:

ATTACHMENTS:

Description	File Name	Type
MSBA draft	FY24_-_Memeorial_School_SOI_-_DRAFT_v2.pdf	Cover Memo
MSBA memo	Fy24_SOI_memo_to_School_Committee.docx.pdf	Cover Memo

Massachusetts School Building Authority

Next Steps to Finalize Submission of your 2024 Statement of Interest (“SOI”)

Thank you for submitting a 2024 SOI to the Massachusetts School Building Authority (the “MSBA”) electronically. **Please note, the District’s submission is not yet complete if the District selected Statutory Priority 1 or Statutory Priority 3.** If either of these priorities were selected, the District must post-mark and submit to the MSBA by the Core Program SOI filing period closure date the required supporting documentation to the MSBA, which is described below.

ADDITIONAL DOCUMENTATION REQUIRED FOR SOI STATUTORY PRIORITIES 1 AND 3 IN ORDER TO BE CONSIDERED COMPLETE:

- If the District selects Statutory Priority 1: Replacement or renovation of a building, which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of the school children, where no alternative exists, the MSBA requires a hard copy of the engineering (or other) report detailing the nature and severity of the problem and a written professional opinion of how imminent the system failure is likely to manifest itself. The district also must submit photographs of the problematic building area or system to the MSBA. The SOI will not be considered complete unless this information is provided.
- If the District selects Statutory Priority 3: Prevention of a loss of accreditation, the SOI will not be considered complete unless a summary of the accreditation report focused on the deficiencies as stated in this SOI are provided.

ADDITIONAL INFORMATION: In addition to the information required above, the District may also provide reports, pictures, or other information they feel will give the MSBA a better understanding of the issues identified at a facility. The additional documentation must also be post-marked and submitted to the MSBA by the Core Program SOI filing period closure date.

If you have any questions about the SOI process please contact the MSBA at 617-720-4466 or SOI@massschoolbuildings.org.

Massachusetts School Building Authority

School District Natick

District Contact Matthew J Gillis Title: Assistant Supt. Finance & Operations TEL: (508) 647-6491

Name of School Memorial

School Address 107 Eliot Street, Natick, MA - 01760

Submission Date 3/15/2024

Statement of Interest (“SOI”) CERTIFICATION

To be eligible to submit an SOI, a district must certify the following:

- ☒ The district hereby acknowledges and agrees that this SOI is NOT an application for funding and that submission of this SOI in no way commits the MSBA to accept an application, approve an application, provide a grant or any other type of funding, or places any other obligation on the MSBA.
- ☒ The district hereby acknowledges that no district shall have any entitlement to funds from the MSBA, pursuant to M.G.L. c. 70B or the provisions of 963 CMR 2.00.
- ☒ The district hereby acknowledges that the provisions of 963 CMR 2.00 shall apply to the district and all projects for which the district is seeking and/or receiving funds for any portion of a municipally-owned or regionally-owned school facility from the MSBA pursuant to M.G.L. c. 70B.
- ☒ The district hereby acknowledges that this SOI is for one existing public school in the district that is currently used or will be used to educate public school students in grades Pre-K through 12 as reported to the Department of Elementary and Secondary Education (the “DESE”) and that the school for which the SOI is being submitted does not solely serve the district’s Pre-K student population.
- ☒ Prior to the submission of the SOI, the district will schedule and hold a meeting at which the School Committee will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is required for cities, towns, and regional school districts.
- ☒ Prior to the submission of the SOI, the district will schedule and hold a meeting at which the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is not required for regional school districts.
- ☒ The district hereby acknowledges that current vote documentation is required for all SOI submissions. The district will use the MSBA's vote template and the required votes will specifically reference the school name and the Statutory Priorities for which the SOI is being submitted.
- ☒ The district hereby acknowledges that it must upload all required vote documentation on the “Vote” tab, in the format required by the MSBA. All votes must be certified or signed and on city, town or district letterhead.
- ☒ The district hereby acknowledges that this SOI submission will not be complete until the MSBA has received all required supporting documentation for Statutory Priority 1 and/or Statutory Priority 3, if either is selected. If Statutory Priority 1 is selected, the district’s SOI will not be considered complete unless and until the district provides the required engineering (or other) report, a professional opinion regarding the problem, and photographs of the problematic area or system. If Statutory Priority 3 is selected, the district’s SOI will not be considered complete unless and until the district provides a summary of the accreditation report focused on the deficiencies as stated in this SOI. The documentation noted above must be post-marked and submitted to the MSBA by the Core Program SOI filing period closure date.

**LOCAL CHIEF EXECUTIVE OFFICER/DISTRICT SUPERINTENDENT/SCHOOL COMMITTEE CHAIR
(E.g., Mayor, Town Manager, Board of Selectmen)**

Chief Executive Officer *	School Committee Chair	Superintendent of Schools
_____	_____	_____
_____	_____	_____
(signature)	(signature)	(signature)
Date	Date	Date

* Local Chief Executive Officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice.

Massachusetts School Building Authority

School District NatickDistrict Contact Matthew J Gillis Title: Assistant Supt. Finance & Operations TEL: (508) 647-6491Name of School MemorialSchool Address 107 Eliot Street, Natick, MA - 01760Submission Date 3/15/2024

Note

SOI Program: CorePotential Project Scope: Renovation\ AdditionIs this a Potential Consolidation? Yes

If "yes", please describe the potential consolidation and/or grade reconfiguration that is anticipated as a result of this SOI submission; please be specific by including the other school name(s) and grade levels that may be impacted.

The Johnson Elementary School is scheduled to close with this school year and be returned to the town on June 30, 2024. Many students have opted into other Natick schools and the remaining 20 not migrating to middle school next year will be reassigned to one of the 4 Natick elementary schools.

The following summary of the Statutory Priorities as set forth in M.G.L. c. 70B, § 8 have been included in the Statement of Interest (for the Core Program, select as many as are applicable):

1. ☐ Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists.
2. ☒ Elimination of existing severe overcrowding.
3. ☐ Prevention of the loss of accreditation.
4. ☒ Prevention of severe overcrowding expected to result from increased enrollment.
5. ☒ Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility.
6. ☐ Short term enrollment growth.
7. ☒ Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements.
8. ☐ Transition from court-ordered and approved racial balance school districts to walk-to, so-called, or other school districts.

SOI Vote Requirement

☒ I acknowledge that I have reviewed the MSBA's vote requirements for submitting an SOI, which are set forth in the Vote Tab of this SOI. I understand that the MSBA requires votes from specific governing bodies, in a format **using the language provided by the MSBA**. Further, I understand that the MSBA requires certified and signed vote documentation to be submitted with the SOI. I acknowledge that my SOI will not be considered complete and, therefore, will not be

reviewed by the MSBA unless the required accompanying vote documentation is submitted in a form that is acceptable to the MSBA. All SOI vote documentation must be uploaded on the Vote Tab.

Each district must prioritize one Core Program Statement of Interest from all of the Statements of Interest that the district has submitted or prepopulated, including any SOIs that may be in the MSBA's capital pipeline. **At no time shall a district have more than one prioritized SOI on file with the MSBA.**

Is this SOI the District Priority SOI? Yes

School name of the District Priority SOI: Memorial

Is this part of a larger Master Facilities Plan and/or Educational Plan within the past five years that includes facility goals for this building and all school buildings in the District? Yes

If "YES", please provide the following:

Facilities Plan Date: 12/17/2020

Planning Firm: TBA Architects

Please provide a brief summary of the plan(s) including its goals and how the school facility that is the subject of this SOI fits into that plan:

A summary of the findings:

The Dore and Whittier Architects, Inc (2012) report (included as an attachment) has an extensive evaluation of the Memorial School from a facilities standpoint. The general summary of this report was that the “building has equipment and building components that have reached the end of their useful life and are due for replacement. Some manufacturers are no longer in business, making parts difficult to find and costly to replace. Codes have changed significantly over the last five decades and have increased requirements to provide safe, healthy, and accessible school environments. Energy Codes have been developed and enhanced over the last 10 years, demanding increased insulation properties in the windows, walls and roofs as well as higher efficiency mechanical and electrical equipment, plumbing fixtures and building systems components.”

They stated that for its age the “overall the facility is in very good condition”, noting the following areas of concern:

Windows and doors - full replacement required
 Fire protection - evaluate water pressure and expand system for full building coverage
 Asphalt driveway and sidewalks - need to be replaced
 Code compliance - full code review assessment and compliance needed
 HVAC - replacement recommended (new boilers, water heater, and unit ventilators since report). Air handling system and DDC controls still need to be addressed
 Full electrical upgrade needed (electrical service panels and feeders, additional classroom plugs, generator, lighting, master clock system, fire alarm devices)
 Interior space renewal needed (kitchen, flooring, doors, toilet rooms etc.)
 ADA - upgrades needed for full compliance
 HazMat - allowance needed for abatement during renovations (asbestos, pcb, lead etc.)

The TBA Architect report in 2020 updated the recommendations and findings of the 2012 Dorr & Whittier report. Key items in this report include the following:

Memorial is at 88% gross square foot utilization using the MSBA standard which qualifies the school as overutilized. Memorial has the appropriate number of classrooms for the current enrollment, however, these rooms are not adequately sized. Special Education , Art, Music, Gymnasium, and the Media Center are significantly undersized. The dining area is not adequate; Memorial has five lunch sections - one per grade for a half an hour each. The building does not have a full service kitchen as the meals are prepared at the high school and then transported over.

TBA recommends expanding and renovating the Memorial School to accommodate the redistribution of

students across the district. This would improve the Memorial, taking advantage of a site with capacity, a building that has not been renovated or expanded but is easily expanded, and allow for consideration of changes to the number of elementary schools. Reducing the number of schools, expanding one and redistricting could alleviate the need to expand other elementary schools.

Provide, if applicable, the most recent budget approval process that resulted in an operating budget reduction and the impact of the reduction to the school district (staff reductions, discontinued programs, consolidation of facilities). Please provide a description of the program modifications as a consequence of these teacher and/or staff reductions, including the impact on district class sizes and curriculum. If no recent teacher layoffs and/or staff reductions have occurred, please enter "Does Not Apply".

The FY25 budget process reflects the initial request of a 7.9%, but after deliberations the School Committee has moved it's request to 7.1% increase. Reductions in staff were largely targeted outside of the direct delivery of the curriculum or the positions became redundant (Principal, Nurse, Librarian) moving from 5 elementary schools to 4 elementary schools. The following positions are planned to be reduced: Assistant Director of Finance, Special Education Budget Analyst, part-time office clerk, Special Education Coordinator, library para-professionals, elementary librarian, a Grade 5 teacher, and a Math Coach (coach position works directly with teachers not students.)

Please provide a description of the local actions and approvals needed to secure both funding for a feasibility study and project funding for a potential building project with the MSBA. Please include schedule information for both funding actions(i.e. Town Meeting, City Council/Town Council meetings, Regional School Committee Meetings).

Natick will follow the MSBA templates and recommended/required language needed for a feasibility study and project funding. The Natick School Committee, Town Advisory Committee (Natick's label for the Finance Committee) were provide early estimates, \$2,000,000 for the feasibility study phase in FY26, and \$70,000,000 for full new construction/renovation project for FY28. Natick is familiar with the MSBA program having completed the Kennedy Middle School and Natick High School in the past 15 years. Natick elected and appointed officials understand that feasibility study leads to a debt exclusion vote for a construction/renovation project. Natick has annual Town meetings in April and October/November each fiscal year. and is likely to have debt exclusion vote for the feasibility study if invited by MSBA. The School Committee and Select Board are aware they will need to vote to proceed to enter the feasibility study phase with MSBA and to put a Feasibility Study before town meeting and probably for debt exclusion ballot vote.

General Description

BRIEF BUILDING HISTORY: Please provide a detailed description of when the original building was built, and the date(s) and project scopes(s) of any additions and renovations including modular units (maximum of 5000 characters).

The Memorial Elementary School is a 58,500 sf masonry building constructed in 1970, with no major additions or renovations. Recent improvements include re-roofing 2010, limited HVAC improvements and PV Array 2010, and fire alarm upgrades 2010.

TOTAL BUILDING SQUARE FOOTAGE: Please provide the original building square footage PLUS the square footage of any additions (field one below) and/or modular units (field two below).

Original Building Plus Additions Square Footage	58500
Modular Units Square Footage	

SITE DESCRIPTION: Please provide a detailed description of the current site, including confirming the address of the school, who has ownership, control, and use of the site, and any known existing conditions that would impact a potential project at the site. Please note whether there are any other buildings, public or private, that share this current site with the school and/or if there are multiple schools housed within the same building. What is the use(s) of this building(s)? (maximum of 5000 characters).

The existing Memorial Elementary School is located at 107 Eliot Street in Natick, Massachusetts. The site is relatively flat in a low density neighborhood. The site consists of approximately 25 acres including the school building and associated parking areas, walkways and play areas. The site is bounded by woodland and residences to the west, north, and east. It is bounded by the existing play fields and Eliot Street to the south.

BUILDING ENVELOPE: Please provide a detailed description of the building envelope, types of construction materials used, and any known problems or existing conditions (maximum of 5000 characters).

The Memorial Elementary School is a 58,500 sf masonry building constructed in 1970, with no major additions or renovations. The school is one contiguous building measuring approximately 245' x 105'. The building is a onestory

structure, approximately 13' tall at the classrooms and 20' tall at the cafeteria and gymnasium. The exterior grade varies 3' to 5', and the interior slab has three elevations. The main entrance area to the school at the south side has several steps, including a concrete ramp. There are also exterior slabs on grade at entrances on the north, east and west sides, and a retaining wall on the north side. The building foundations appear to consist of simple spread footings on natural soil.

The original concrete foundation is generally in good condition. Some evidence of cracking and deterioration is at exterior stairs and entry pavement. The concrete loading dock and steps exhibit severe failure. The exterior envelope of the building is original with no updates to windows, doors, brick or caulking. The window systems are at the end of their useful life and many are now inoperable. The windows are single-pane in metal frames. While they have held up well for the past 40 years, they allow for a significant amount of heat loss; the R-value for this entire window opening is less than R-1. Caulking between the windows and the brick is in need of replacement. Some evidence of water infiltration is visible at the window openings. Excessive heat loss causes inefficiencies in the HVAC system and creates an inadequate learning environment during winter months.

Exterior doors and door hardware are nearing the end of life and need to be replaced. The insulated hollow-metal doors in hollow metal frames are in fair condition. All door hardware is nearing the end of life. Doors that are located within a covered and protected entry-way are in much better condition than those that are exposed to the elements. 40 years of snow, salt and water has taken its toll on the base of the doors and frames in particular. Major renovations to the exterior envelope would likely need to include additional insulation to meet current energy codes.

Known problems are detailed above but include deterioration of high traffic area concrete and windows and doors

beyond their useful lives. Water infiltration throughout the building is caused by failing caulking and masonry issues. The building as a whole has reached its useful life at 53 years old.

Has there been a Major Repair or Replacement of the EXTERIOR WALLS? NO

Year of Last Major Repair or Replacement:(YYYY)

Description of Last Major Repair or Replacement:

Total Roof Square Footage 65000

Roof Section A

Is the District seeking replacement of the Roof Section? YES

Area of Section (square feet) 65000

Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))

EPDM - The roof was replaced in 2011 and is warranted through 2026.

Age of Section (number of years since the Roof was installed or replaced) 13

Description of repairs, if applicable, in the last three years. Include year of repair:

No capital repairs needed

Total Window Count 45

Window Section A

Is the District seeking replacement of the Windows Section? YES

Windows in Section (count) 45

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

Single Pane

Age of Section (number of years since the Windows were installed or replaced) 53

Description of repairs, if applicable, in the last three years. Include year of repair:

No capital repairs have been done on the windows in the last three years

MECHANICAL and ELECTRICAL SYSTEMS: Please provide a detailed description of the current mechanical and electrical systems and any known problems or existing conditions (maximum of 5000 characters).

The electrical systems, mechanical piping and the rooftop air handling systems in Memorial Elementary School are well beyond their useful lives. Although these systems have been upgraded over the years, the work performed is patchwork to allow the building to operate. The existing electrical system is mostly original to the building and replacing parts is nearly impossible. As we add more technology into our educational programming, we are increasingly concerned with the ability of the electrical system to support the loads required.

Mechanical upgrades for the HVAC system were completed in 2014. That project included new boilers, unit ventilators, and water heaters. The distribution system for heating and domestic water is original to the building. Known problems in the mechanical system include needed upgrades of the rooftop air handling system, investigation or replacement of the distribution system.

The electrical system is in poor condition. Most of the system is original to the building and cannot support additional load. Preventative maintenance is limited due to the age of the system and availability of parts. The generator is original to the building and does not always function when needed. It does not adequately support the operation of the building. These are known issues and the recommended action is to replace the entire system.

Total Building Boilers 2

Boiler Section Boiler 1

Is the District seeking replacement of the Boiler? YES

Is there more than one boiler room in the Building? YES

What percentage of the Building is heated by the Boiler? 100

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

Natural Gas

Age of Boiler (number of years since the Boiler was installed or replaced) 10**Description of repairs, if applicable, in the last three years. Include year of repair:**

No major repairs in the last 3 years

Has there been a Major Repair or Replacement of the HVAC SYSTEM? YES**Year of Last Major Repair or Replacement:(YYYY)** 2014**Description of Last Major Repair or Replacement:**

The project included new boilers, unit ventilators, and water heaters. Mechanical upgrades for the HVAC system was completed in 2014. That project included new boilers, unit ventilators, and water heaters. The distribution system for heating and domestic water is original to the building. Known problems in the mechanical system include needed upgrades of the rooftop air handling system, investigation or replacement of the distribution system.

Has there been a Major Repair or Replacement of the ELECTRICAL SERVICES AND DISTRIBUTION SYSTEM? NO**Year of Last Major Repair or Replacement:(YYYY)****Description of Last Major Repair or Replacement:****BUILDING INTERIOR: Please provide a detailed description of the current building interior including a description of the flooring systems, finishes, ceilings, lighting, etc. (maximum of 5000 characters).**

Floors Vinyl Composite Tile (VCT) is the primary flooring material throughout the school; it is found in the corridors, classrooms and cafeteria space. Overall it has been maintained well and appears to be in good condition. A few areas where they have been subject to excess moisture, particularly near entry/exit doors, tiles have separated or are lifting. These damaged tiles are trip hazards and although we have asbestos mitigation plans in place, the exposed areas could pose a health hazard given the asbestos content of the VCT. The flooring is outdated and gives the school an institutional look. Each classroom has plastic laminate counters with sinks and cabinets in fair to good condition. Some areas have been upgraded with new tops, while others are showing signs of wear. Although the floor has held up well in most areas it is beyond its useful life and ready for a replacement. Mitigation of asbestos in the replacement would significantly increase cost and currently presents as a health hazard to students and staff.

The lighting throughout the building is primarily linear 4ft fluorescent with acrylic lenses – surface and recess mounted. There is a minimal amount of incandescent lighting evident. The incandescent fixtures are for emergency means of egress lighting and for decorative wall highlighting, such as track lighting. Lighting systems are several generations old and need to be updated. Inadequate lighting is a safety concern in the building, especially as the building has semi-regular power issues. Although maintained well for their age, most interior systems are in need of updating or replacement. Interior doors and hardware are at the end of life and should be replaced. Most door hardware does not meet ADA

requirements. Window treatments, trim work and other fixed furnishings are tired and are in need of updates.

SPACES AND PROGRAMS: Please provide a description of the number and sizes (in square feet) of all spaces. Please also provide the current grade structure and programs offered. If a vocational or comprehensive high school offering Chapter 74 Programs and/or Career Technical Education, please include the number of programs currently offered (maximum of 5000 characters).

The Memorial Elementary School has grown to 450 student K-4 school as of the 2023-2024 March 1, 2024. In addition, the building houses an after and before school child care program called ASAP (After School Activities Program). In recent projections for the district, the enrollment was projected to move to 392 in 2023, 389 in 2024 and 386 in 2025. We are currently outpacing these projections and expect that trend to continue.

A recent Natick general analysis of housing, birth rates, and population trends, by Jerome McKibben of McKibben and Associates indicates that in the past ten years, Natick, due to its attractive Boston bedroom community status and its then affordable price point for real estate, outpaced projections for enrollment precipitating an

unprecedented enrollment spike. However, in recent years, birth rate data has declined slightly, but the closing of the 2 section Johnson Elementary school, has increased enrollment and space needs to meet the programs we are required to deliver. However, the need to close a school building that the town and school committee has deemed not a match for significant future capital investment for school programming, coupled with the uncertainty of the housing market, the post pandemic population movement, and the sheer number of building and improvement permits pulled in Natick during the pandemic make us forecast that should the 30% of 65+ homeowners decide to sell and move out of Natick, the Memorial school zone would be significantly impacted and a need for a town redistricting plan will be inevitable. At this time, the constraints on the Memorial building do not allow us to functionally consider it for future enrollment growth. Even if such an enrollment surge does not arise, we continue to find it inadequate to provide the full range of programming necessary to serve our students, their special education, occupational, therapeutic, psychological, programmatic needs nor it is able to house the professionals necessary to address these needs. Behavioral program needs such as additional behaviorists, behavior technicians, OT/PT, psychology and additional special education learning staff will be necessary to make Memorial able to run the full spectrum of services we provide at the other elementary schools. In addition, because more and more students, who, in prior generations, may have been born prematurely and/or as multiples and never matriculated to public school or were placed in outside placements, are now matriculating to public school in Natick. It is our pride and moral obligation to serve these students in their neighborhood school -- just as we do in all other elementary schools. We need the Memorial facility to be able to provide this range of services to the students as well.

TOTAL SCHOOL STUDENT ENROLLMENT: Please provide the current student enrollment at the school as of the SOI filing. 450

CURRENT GRADES SERVED AT SOI FACILITY: K,1,2,3,4

SCHOOL TYPE: Comprehensive

CAPACITY and UTILIZATION: Please provide the original design capacity and a detailed description of the current capacity and utilization of the school facility. Please also describe in detail any spaces that have been converted from their intended use to be used as classroom space (maximum of 5000 characters).

DREFT

Core Academic Spaces - 21 rooms - 19,946 square feet

Special Education - 10 rooms - 2,803 square feet

Art & Music - 2 rooms - 2,489 square feet

Health and Physical Education - 4 rooms, 4,324 square feet

Media Center - 1 room - 1,565 square feet

Dining and Food Services - 5 rooms - 5,018 square feet

Memorial has twenty one elementary classrooms that are organized in pods by grade. Most kindergarten classrooms are adequately sized while grades 1-4 are undersized, averaging 850 square feet. Specialized spaces are dispersed throughout the building connected by ramps and walkways branching off of the main lobby.

Natick's model at the elementary schools is to provide a learning center for each grade. At Memorial there are three learning centers and a literacy center. There are no self-contained special education rooms as the delivery method in Natick is for targeted push-in and pull-out instruction. So, while the total number of rooms provided for special education is in line with the standard, the total area is only 62% the size recommended at 2,803 sf. The layout of the school is suited to having a learning center of classroom size per pod, but those spaces have been used as core classrooms. Grades K-2 share a space that is classroom sized and the others have small group rooms of under 200 sf. On a per grade basis, each has about half the amount of recommended space in a small group room.

Is there overcrowding at the school facility? YES

If "YES", please describe in detail, including specific examples of the overcrowding and describe steps taken by the administration to address capacity issues.

Yes, the buildings original design accommodated three sections per grade or 15 main classrooms and currently has 22 main classrooms. In effect the building is conservatively 28-43% above its original designed capacity.

The October 1, 2023 enrollment is 446 and the designed enrollment was between approximately 312 to 348 students. At class size of 20 K students and 21 for Grades K-4 the building serves 312 students,. At 20 Kindergarten students per class and 24 per classroom that is a design for 348 students. The building enrollment is 28%-43% above originally designed capacity. Currently, the Memorial School has zero pre-K classrooms. The original design also included open project area at each “learning pod”, a gym, caf torium, lecture area, library and music room are part of the original design, as well as three self-contained kindergartens and special education classrooms. Due to expanding enrollment all of the open project areas have been enclosed for additional teaching spaces, the lecture area has become a music room, the original music room has been converted to a third grade classroom. The former teacher dining area and prep rooms have become a kindergarten classroom and the self-contained special education area is now two (2) third grade classrooms. There are currently four sections per grade at K, 1 and 4 with 5 sections at grades 2 and Grade 3.

Please provide the current student to teacher ratios at the school facility that is the subject of this SOI (# students per teacher) 15

Please indicate if the ratio is a goal, practice or a class size policy adopted by the School Committee
There is no official class size policy.

The maximum class size for Pre-K is 16 - Confirm MBK
The target class for Kindergarten is 20 - confirm with SC
The target class size for Grades 1-4 is 21 - confirm with SC

Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI (# students per teacher) 12

MAINTENANCE and CAPITAL REPAIR: Please provide a detailed description of the district’s current maintenance practices within the past five years, its capital repair program, and the maintenance program in place at the facility that is the subject of this SOI. Please include specific examples of capital repair projects undertaken in the past, including any override or debt exclusion votes that were necessary (maximum of 5000 characters).

The routine maintenance program at Memorial consists of daily cleaning with a staff of two and a half (2.5) custodians. Daily cleaning is bolstered by custodial project work during school vacations and the summer. Project work includes detailed cleaning, minor repairs, and floor waxing. Maintenance work is provided by maintenance technicians in the Facilities department as well as hired vendors. Work orders are tracked with a digital work order system to ensure items are tracked and completed. In addition to repair work, yearly maintenance is performed for the boilers, life safety systems, air handling units and other critical building systems. Capital repairs are determined based on life cycle analysis of building components and systems as well as needs based projects based on condition assessments. The most recent capital projects include a new roof in 2010 and an HVAC system update in 2014. An exterior concrete and asphalt project is planned for summer 2022 and includes replacement of the main entryway and sidewalk area at the bus drop off in the front of the school. Capital projects are submitted to either spring or fall town meeting where they are voted on and if approved given a funding source for the work.

Priority 2

Question 1: Please describe the existing conditions that constitute severe overcrowding.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

The building was originally designed as a three-section school for Grades K-4, with a single Pre-K classroom. Currently, the building houses 22 classroom sections with zero Pre-K classrooms. Class sizes range from 18-23 students and many classrooms are approximately 850 SF, so increasing class size is not practical in many cases. There are many spaces needed for comprehensive program PreK-4 elementary program that do not exist in the current building. As a result, students are assigned to other schools or services are provide in substandard spaces, such as hallways, and former closets and former storage spaces.

Priority 2

Question 2: Please describe the measures the School District has taken to mitigate the problem(s) described above.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

Spaces not originally designed to be classrooms have been converted classrooms to meet the enrollment demand. For FY24, a Pre-K classroom was moved out of the building to stand-alone building across town, so a Grade 4 classroom could be added. Details about past renovations are in prior SOIs and in other priorities.

Priority 2

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

Natick has to deliver services in the hallways, closets and storage rooms as the enrollment has grown from 3-section school per grade to 4 or 5 sections per grade in FY24. See updated explanations and details in priorities 4 and 7 to avoid redundancy.

Please also provide the following:

Cafeteria Seating Capacity: 205

Number of lunch seatings per day: 5

Are modular units currently present on-site and being used for classroom space?: NO

If "YES", indicate the number of years that the modular units have been in use:

Number of Modular Units:

Classroom count in Modular Units:

Seating Capacity of Modular classrooms:

What was the original anticipated useful life in years of the modular units when they were installed?:

Have non-traditional classroom spaces been converted to be used for classroom space?: YES

If "YES", indicate the number of non-traditional classroom spaces in use: 4

Please provide a description of each non-traditional classroom space, its originally-intended use and how it is currently used (maximum of 1000 characters):

Same answer as priority # 4

Please explain any recent changes to the district's educational program, school assignment policies, grade configurations, class size policy, school closures, changes in administrative space, or any other changes that impact the district's enrollment capacity (maximum of 5000 characters):

The most recent changes are the moving of the Pre-K program out of the Memorial School to meet K-4 enrollment demand for classroom space and the closing of the 2-section Johnson School as it was deemed to antiquated to renovate to meet current building codes and programmatically it was not deemed an efficient delivery model for comprehensive PreK-4 school.

What are the district's current class size policies (maximum of 500 characters):

Same answer in Priority # 4

Priority 4

Question 1: Please describe the conditions within the community and School District that are expected to result in increased enrollment.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

The Memorial Elementary is located in South Natick which is the only area of Natick that has ample buildable open land for additional housing and housing complexes. We anticipate housing expansion in the catchment area of the Memorial School in future years.

The Johnson Elementary School is now scheduled to close in June of 2024 after serving the Town for nearly 75 years. This school is in close proximity to Memorial Elementary, and Memorial absorbed many former Johnson students and is expecting about 9 of the remaining 20 Johnson students to attend next year.

The confluence of closing a school, a historically low supply but high price housing market, post-pandemic population shifts, and the sheer number of building and improvement permits pulled in Natick over the last few years lead the Town to forecast that the Memorial School zone would be significantly impacted should as little as 30% of 65+ homeowners decide to sell their homes. The school district and town leadership are anticipating a town-wide redistricting plan for elementary schools following the closure of Johnson.

Additionally, Memorial is presently undersized for the programming that other elementary schools accommodate within the district. Memorial is the only school in our district that does not house the full range of special education programs (a continuum of sub separate and inclusion programs for students with a range of intensity of need for disabled students). We currently move ELL (English Language Learner) to the Brown or Lilja elementary schools as we do not have space to adequately address the program needs at Memorial.

Priority 4

Question 2: Please describe the measures the School District has taken or is planning to take in the immediate future to mitigate the problem(s) described above.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

Overall, the district lacks available space to support the existing programs today. The district classrooms to Memorial within the next five years as a safety net should overcrowding remain and MSBA does not invite Memorial into the Feasibility study phase. This would bring Memorial in line with Lilja and Brown Elementary schools that received modular classrooms in 2016 and 2017, meaning three of our four remaining elementary schools would have modular classrooms and still have overcrowding in the public shared spaces like the Cafeteria, Gym, Library, and other specialized spaces. Natick is looking to improve quality of the spaces and remove impediments for delivering the curriculum. considers adding modular

Given the age of Memorial's structure and systems, the town and district would prefer to improve and expand Memorial to right size to fit all of the building's current programmatic needs and enrollment projections rather than add temporary space to an increasingly aging and undersized facility for its current and foreseeable future enrollment.

Priority 4

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

Memorial Elementary School is currently over designed enrollment and practical capacity and all available spaces are utilized to provide educational opportunities for the majority of students. Our ELL and special education students at Memorial bear the largest burden of the space constraints since they need to be transported across the district for adequate instruction, which is detailed above. our Pre-K students also must be relocated outside of their elementary school district as the classroom now serves Grade 4.

In addition to the noted lack of capacity for the full range of program demands for a modern elementary school, the Memorial School cannot house the full range of administrative and professional staff required to consult classrooms in a modern elementary school. The special education coordinator squats in the school conference room as an office but cannot use it while the school runs IEP, data team or parents meetings.

The music staff run classes in a modified classroom which is the only open space within the day for staff professional development or professional learning community training.

The cafeteria is the auditorium so performance and community engagement cannot occur during the large mid-day chunk. Also relative to community engagement, the traffic system and design currently in place does not serve the current number of children and families in existence at the site.

Office spaces for learning center special educators, occupational, speech, behavioral and physical therapy staff do not exist; they often work in and meet with parents in hallway or renovated closet or storage spaces. Some tier 2 small group interventions occur in hallway spaces.

Playground equipment needs update and repair and will soon reach its expected useful life.

Please also provide the following:

Cafeteria Seating Capacity:	205
Maximum number of lunch seatings that can be accommodated per day:	5
Would modular units be necessary on-site to be used for classroom space as a result of future overcrowding?:	YES
Would non-traditional classroom spaces need to be converted to be used for classroom space?:	YES
If "YES", indicate the number of non-traditional classroom spaces impacted:	5
Please provide a description of each non-traditional classroom space, its originally-intended use and how it is currently used (maximum of 1000 characters).:	
Four project areas were converted to classrooms and one Pre-K classroom is now being used for Grade 4. The effect of moving Pre-K out of 3 elementary schools to a stand alone building with 4 pre-K classrooms impedes efficient delivery of services to those students.	
Please explain any recent changes to the district's educational program, school assignment policies, grade configurations, class size policy, school closures, changes in administrative space, or any other changes that are leading to a situation of anticipated overcrowding (maximum of 5000 characters).:	

Memorial currently has 4 classrooms that were originally open spaces for collaboration that are now closed in for classrooms. They were intended to be used for group work, pulling multiple classes together and work on team building and curriculum projects. These spaces were located in the wings of the grade 1, 2 and 3/4 areas and are now being used as classrooms.

Over the years, flexible space at Memorial has been cannibalized for needed program space. Some examples include:

Memorial has repurposed open spaces for closed-in classrooms.

Our auditorium is no longer functional and has been repurposed for teacher planning space.

Administrative space does not allow for adequate space for school leadership.

Computer labs and other specialized areas have become designated classrooms.

Memorial Elementary was originally designed to educate approximately 324-348 students. The 2023-2024 enrollment is 446

students.

The district transports ELL and special education students across the district to other elementary schools because Memorial does not have the dedicated space to educate these students.

Memorial also lacks any self contained special education space, an inequity we hope resolve with right sized building for our programs.

What are the district's current class size policies (maximum of 500 characters)?:

The district does not have a class size policy. However, the district has had a procedure for the past ten plus years that

for every elementary class that moves above 22, an additional staffer/paraprofessional or support staffer

(interventionist) is added to the classroom to assist with class sizes. So the target class size is effectively 21.

There are class sizes limits only for middle and high school band, chorus and physical education classes.

Priority 5

Question 1: Please provide a detailed description of the issues surrounding the school facility systems (e.g., roof, windows, boilers, HVAC system, and/or electrical service and distribution system) that you are indicating require repair or replacement. Please describe all deficiencies to all systems in sufficient detail to explain the problem.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

Exterior envelope: The roof was replaced in 2011. The exterior doors and windows are original to the building and are in need of replacement in the near term. Caulking is deteriorating leading to water infiltration in the building. This has caused mold issues as recently as the summer of 2021. The exterior walls are masonry block and brick are due for cleaning and repointing in some areas. Building windows are original to the building and most are not functional. Caulking surrounding the windows has allowed for water infiltration and damage. The single pane windows are inefficient and create environmentally challenging classrooms.

HVAC: The boilers were replaced in 2014 and the unit ventilators were replaced in 2005. There is no central air conditioning in the building. There are five air handlers on the roof that need to be replaced in the near term. The distribution system for domestic hot water and HVAC is original to the building and nearing its end of life. COVID air quality mitigation practices such as pleated filters with a higher merv rating have pushed these systems more than their normal load for the last few years, which is accelerating their maintenance and replacement schedules.

Code compliance: Memorial School does not have a whole building sprinkler system. Code compliance would need to be evaluated compared to current code.

Space renewal: The interior of the Memorial School is dated. Flooring, window treatments, interior doors, door hardware, and other internal finishes need to be updated in the near term.

Electrical system: The electrical system is original to the building and is significantly outdated. The switchgear, distribution system and emergency power generator all need to be updated in the near term.

Priority 5

Question 2: Please describe the measures the district has already taken to mitigate the problem/issues described in Question 1 above.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

The District has invested resources in this building as evidenced by the roof and HVAC improvements. The District has established a five year capital plan which has been shared with Town administration and the Finance Committee. The District continues to maintain the building in good condition despite its age. The capital plan identifies the need for window replacement, electrical switchgear replacement, exterior caulking and a new generator. These items will be presented at Town meeting for funding.

Priority 5

Question 3: Please provide a detailed explanation of the impact of the problem/issues described in Question 1 above on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

Exterior envelope: The windows and caulking issues have a direct impact on the educational programs. Mold issues caused by water infiltration create a potential health hazard if not found and addressed quickly. Some of the windows are no longer functional, preventing them from being opened during the spring and fall. On more than one occasion, degraded windows have been opened by children and teachers only to fall on the floor or in their hands. They are heavy sections and could be a safety issue as they continue to degrade.

HVAC: The rooftop air handlers provide fresh air to the building. These units are at the end of their useful life. Fresh air is critical for providing a healthy environment for education.

Code compliance: Life safety and code issues are important components of the educational environment. Updated systems enhance the built environment to create an inclusive learning environment.

Space renewal: Some of the original door hardware prevents doors from being secured properly. This has a direct impact on the security of the building.

There are tall window treatments that no longer shade the sun. This impacts learning because the sun shines directly on the screen making it unreadable for the students. Old carpets create an unappealing and less sanitary space for younger students to gather on the floor. Space renewal projects enhance the learning environment. Exterior concrete and asphalt entries and walkways are in poor shape and must be replaced soon.

The hard surfaces are beyond their useful life and need to be replaced.

Electrical system: Electrical system failures directly impact the learning environment. Memorial frequently loses power and does not have a reliable back up generation system. This has resulted in having to cancel school on several occasions. The switchgear and distribution system is at the end of its useful life. Poor plug placement and old infrastructure limit new installations. The switchgear is the largest risk to the educational environment. Failure of the switchgear would likely force the building to be closed until a new unit could be procured. No parts are available for equipment this old.

Priority 5

Question 4: Please describe how addressing the school facility systems you identified in Question 1 above will extend the useful life of the facility and how it will improve your district's educational program.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

Addressing the building facility systems will keep Memorial School functioning for many generations to come. The building generally has been maintained appropriately but critical systems need to be updated for the building to continue to operate as it was intended. The building will need significant capital investment to continue to function as intended.

New systems would also help with the town's energy goals.

The building is currently at a critical point where ongoing maintenance of aging systems and facilities are less productive to prevent future issues from arising. The building and many systems within are either approaching or have met or are past the end of their useful lives. Memorial is now in a position where wholesale upgrades need to be done to preserve its educational value to the community.

Programmatically, having spaces designed for the intended services removes the impediments staff presently work around to deliver services. We would stop delivering services in hallways, closets and storage rooms and deliver them in spaces designed learning. The goal of having three lunch periods would be functional and improve student readiness to continue learning. Returning dedicated Pre-K classrooms back the Memorial School would reduce travel time to and from school and increase access to a variety of support services within the building.

If not located elsewhere in this SOI, please also provide the following information:

Have the systems identified above been examined by an engineer or other trained building professional?:

NO

If "YES", please provide the name of the individual and his/her professional affiliation (maximum of 250 characters):

Dore & Whittier Architects, Inc. evaluated the Memorial School in 2012

TBA Architects, Inc evaluated the Memorial School in 2020

The date of the inspection: 12/22/2020

A summary of the findings (maximum of 5000 characters):

The Dore and Whittier Architects, Inc (2012) report has a more extensive evaluation of the Memorial School from a facilities standpoint. The general summary of this report was that the “building has equipment and building components that have reached the end of their useful life and are due for replacement.

Some manufacturers are no longer in business, making parts difficult to find and costly to replace. Codes have changed significantly over the last five decades and have increased requirements to provide safe, healthy, and accessible school environments.

Energy Codes have been developed and enhanced over the last 10 years, demanding increased insulation properties in the windows, walls and roofs as well as higher efficiency mechanical and electrical equipment, plumbing fixtures and building systems components.” They stated that for its age the “overall the facility is in very good condition”, noting the following areas of concern:

Windows and doors - full replacement required

Fire protection - evaluate water pressure and expand system for full building coverage

Asphalt driveway and sidewalks - need to be replaced

Code compliance - full code review assessment and compliance needed

HVAC - replacement recommended (new boilers, water heater, and unit ventilators since report).

Air handling system and DDC controls still need to be addressed.

Full electrical upgrade needed (electrical service panels and feeders, additional classroom plugs, generator, lighting, master clock system, fire alarm devices)

Interior space renewal needed (kitchen, flooring, doors, toilet rooms etc.)

ADA - upgrades needed for full compliance

HazMat - allowance needed for abatement during renovations (asbestos, pcb, lead etc.)

The TBA Architect report in 2020 updated the recommendations and findings of the 2012 Dorr & Whittier report. Key items in this report include the following:

Memorial is at 88% gross square foot utilization using the MSBA standard which qualifies the school as overutilized.

Memorial has the appropriate number of classrooms for the current enrollment, however, these rooms are not adequately sized.

Special Education, Art, Music, Gymnasium, and the Media Center are significantly undersized.

Dining and food service is not adequate. Memorial has five lunch sections - one per grade for a half an hour each. This impacts scheduling instructional services and classes as well as student readiness for an entire school day. Lunch to early or to late can impede student readiness to learn during the day.

TBA recommends expanding and renovating the Memorial School to accommodate the redistribution of students across the district. This would improve the Memorial, taking advantage of a site with capacity, a building that has not been renovated or expanded but is easily expanded, and allow for consideration of changes to the number of elementary schools. Reducing the number of schools, expanding one and redistricting could alleviate the need to expand other elementary school.

Priority 7

Question 1: Please provide a detailed description of the programs not currently available or in substandard spaces due to facility constraints, the state or local requirement for such programs, and the facility limitations precluding the programs from being offered.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

We are currently unable to provide special education programs for students with substantial needs due to spacing constraints. some educational services are consistently provided in hallways.

In the past there have been programs offered at Memorial but due to increasing enrollment we had to move all programs to other schools in the district. In a prior year, we moved a pre-k program out of Memorial due to increased enrollment and the need to add an additional Kindergarten classroom.

We are also unable to offer services for EL students. Again because of space constraints we do not have a space for these services to take place and are required to bus these students to another school.

We currently have counselors working in closets in order to provide social emotional support to our students. This impacts the space that the counselor has to pull small groups and work on the social emotional challenges these students face.

Due to lack of dedicated, enclosed space for students with intense special education needs, the Memorial school is unable to offer services for students in this category and must transport students to another school in-district or out-of-district for services.

Priority 7

Question 2: Please describe the measures the district has taken or is planning to take in the immediate future to mitigate the problem(s) described above.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

We have made the best of the available space and resources the current Memorial Elementary School has to offer. Over the past few years we have rebuilt specialized spaces to accommodate increased enrollments, rebuilt flexible space for teacher planning space, and utilized storage spaces for offices and private spaces for special education.

We also transport students to other schools in the district because Memorial cannot meet their needs. The measures we currently take allow our students to receive the education and support they deserve, however, the physical limitations of the Memorial building add cost, staff resources, and unnecessary time to this delivery of education.

We anticipate future enrollment to warrant more spaces than currently available. The closing of the Johnson Elementary School in June of 2024 and recent enrollment enrollment trends in Natick reasonably predict the building will remain overcrowded and inadequate to provide a comprehensive Pre-K-4 program.

The current school does not have adequate space to accommodate these students and the town and district will need to take an in depth look at how Memorial and our elementary schools are structured in the near future.

Priority 7

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

If a response has been previously provided, please reference which page the information is on in lieu of copying and pasting. The responses per Priority should capture new or different information than previously provided within this document.

Because of the space constraints, students who live within the Memorial district are required to be bussed to other schools which may be on the opposite side of town. This impacts these students as they are unable to attend a school near their home and attend with their neighborhood peers.

EL students also have to spend time on buses traveling to schools across town preventing them from being able to attend school with their neighborhood peers.

Pre-K students are in a 4-classroom stand alone building shared with a non-profit aftercare program. They too spend time traveling across town and do not attend school with their K-4 siblings. Professional staff, including nurses, have to travel to the building for scheduled services and are not as available to assist with student issues as their peers assigned to K-4 elementary school building.

CERTIFICATIONS

The undersigned hereby certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this statement of Interest and submitted hereto are true and accurate and that this Statement of Interest has been prepared under the direction of the district school committee and the undersigned is duly authorized to submit this Statement of Interest to the Massachusetts School Building Authority. The undersigned also hereby acknowledges and agrees to provide the Massachusetts School Building Authority, upon request by the Authority, any additional information relating to this Statement of Interest that may be required by the Authority.

Chief Executive Officer ***School Committee Chair****Superintendent of Schools**_____
(signature)_____
(signature)_____
(signature)_____
Date_____
Date_____
Date

* Local Chief Executive Officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice.



Natick Public Schools

CENTRAL OFFICE

13 East Central Street, Natick, MA 01760

Dr. Bella Wong, Superintendent

Timothy Luff, Deputy Superintendent

Matthew J. Gillis, Assistant Superintendent for Finance

Susan Balboni, Assistant Superintendent for Teaching, Learning, and Innovation

To: Dr. Bella Wong, Interim Superintendent
Natick School Committee

From: Matthew Gillis, Assistant Superintendent of Finance

Date: March 15, 2024

Re: MSBA Statement of Interest and Priority # 1 – Memorial Elementary

Natick has submitted a Statement Of Interest (SOI) to the Massachusetts School Building Authority (MSBA) to explore options and possibly secure state funding to renovate, replace or upgrade the Memorial Elementary School each of the past two years. The following pages show the FY24 SOI and Priority # 2, elimination of exiting severe is the most significant update from prior submittals.

[The application deadline is Friday April 12, 2024.](#)

Vote Required to submit an SOI

MSBA has a prescriptive process to accept a SOI for review. The School Committee and Select Board must both vote to submit the SOI, with the MSBA's vote language. Some signatures and certifications are also required, but main action needed is for the governing bodies to vote to proceed with submitting the SOI. The School committee is scheduled to vote first to start this process. The Select Board commonly votes after the School Committee has voted affirmatively and then the Town proceeds in a united fashion.

The following page has the vote language, in the box and quotations, as it pertains the Memorial School Statement of Interest for 2024.

Natick Public Schools does not discriminate on the basis of race, creed, color, sex, age, gender identity, religion, nationality, sexual orientation, disability, pregnancy and pregnancy-related conditions, physical and intellectual differences, immigration status, or homeless status.

Motion Requested

" Having convened in an open meeting on **March 18, 2024**, prior to the SOI submission closing date, the School Committee of the Town of Natick , in accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest Form **dated _March 15, 2024** for the Memorial Elementary School located at 107 Elliot Street which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future Natick seeks to remedy:

Priority # 2 Elimination of existing severe overcrowding.

Priority # 4 Prevention of severe overcrowding expected to result from increased enrollments.

Priority # 5 Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating & ventilations systems, to increase energy conservation and decrease energy related costs in school facility.

Priority # 7 Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements.

and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority or commits the Natick School Committee to filing an application for funding with the Massachusetts School Building Authority."

ITEM TITLE: March 1st Enrollment Report

DATE:

ITEM TYPE:

ITEM SUMMARY: LINK - March 1st Enrollment Report



BACKGROUND INFORMATION:

RECOMMENDATION:

ATTACHMENTS:

Description	File Name	Type
March 1st Enrollment Report	March_1st_-_NPS_Student_Enrollment_-_2024_03_March_(1).pdf	Cover Memo

Natick Public Schools - Student Enrollment February 01, 2024

		February 01, 2024																	March 01, 2024															
			K	1	2	3	4	5	6	7	8	9	10	11	12	Total				K	1	2	3	4	5	6	7	8	9	10	11	12	Total	
NHS KENNEDY WILSON												435	427	382	375	1,619	NHS KENNEDY WILSON												435	428	382	375	1,620	
							243	215	236	221						915								243	215	236	221					915		
							186	194	179	189						748								186	193	181	189					749		
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		132	368	354	429	371	399	429	409	415	410	435	427	382	375	5,335			135	366	355	428	370	399	429	408	417	410	435	428	382	375	5,337	

ITEM TITLE: Approve Student Opportunities Act (SOA) Report
DATE:
ITEM TYPE:
ITEM SUMMARY:
BACKGROUND INFORMATION:
RECOMMENDATION:

ITEM TITLE: Approve MSBA SOI for Memorial School
DATE:
ITEM TYPE:
ITEM SUMMARY:
BACKGROUND INFORMATION:
RECOMMENDATION:

ITEM TITLE: Approve the Recommended FY25 School Budget
DATE:
ITEM TYPE:
ITEM SUMMARY: LINK - FY25 Budget
BACKGROUND INFORMATION:
RECOMMENDATION:

ATTACHMENTS:

Description	File Name	Type
FY25 Budget	3.18_NPS_FY25_Budget_FinCom_Sub-Comm.pdf	Cover Memo



Natick Public School Department FY25 Budget Presentation

To the FinCom Sub-Committee

March 11, 2024



KEY FACTORS FOR THE FY25 BUDGET

- Overall student enrollment remains steady for the next two years except for the high school which will continue to increase over the next 6 to 7 years
- The pandemic negatively impacted students' academic, social and emotional growth.
- Increased numbers of students require mandated services post pandemic; increases are expected to continue due to documented trends
- Commitment to the NPS Portrait of a Graduate for ALL students remains imperative
- One time funding has been used to address immediate and critical student needs
- This reserve of pandemic one time funding will be exhausted after FY25
- The FY25 Budget absorbs previously remaining grant funded positions and newly created positions to address increasing student needs not previously funded in the FY24 Budget
- New Transportation Bid
- Modest staffing improvements related to student services (Elementary, Middle, High School)



FY25 BUDGET FINANCIAL ASSUMPTIONS

- There are no new initiatives in the FY25 Budget
- Federal and state grants are level funded
- Implements current contract agreements (COLA, Steps, lanes, longevity)
- Lowered rate of reimbursement for circuit breaker (75 to 70%)
- Mandates for services (IEPs, 504s, EL, McKinney-Vento)
- 5.4 million offset against circuit breaker reserve
- 9.9% increase in transportation costs
- No changes to student fees
- Assumes the reestablishment of the Bus Subsidy that did not exist for FY24
- Incorporates previously grant funded and newly created positions intentionally covered by circuit breaker in FY24
- \$793,639 in staffing reductions and savings for FY25 (Elementary, Middle, Central Administration)
- \$149,780 in staffing increases (Elementary, Middle, High)



ENROLLMENT

Natick Public Schools Cohort Survival Only - THREE Year Avg - Post COVID Shutdown Year

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Live Births	417	390	394	397	364	356	380	360	360	360	360	360
School Year	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
Multiplier 3 Yr Avg	10/1/2021	10/1/2022	10/1/2023									
Actuals												
PK	0.3227	132	138	124	128	117	115	123	116	116	116	116
K	0.9385	406	356	359	373	342	334	357	338	338	338	357
1	1.0360	359	418	354	372	386	354	346	369	350	350	350
2	1.0054	382	368	426	356	374	388	356	348	371	352	352
3	1.0164	421	395	371	433	362	380	394	362	354	378	358
4	0.9885	394	420	392	367	428	358	376	390	357	350	373
5	1.0149	413	405	429	398	372	434	363	381	396	363	379
6	0.9873	409	411	404	424	393	367	429	358	376	391	358
7	0.9982	434	404	412	403	423	392	367	428	358	376	390
8	1.0152	412	442	414	418	409	429	398	372	435	363	381
9	0.9939	394	420	433	411	416	407	427	396	370	432	361
10	1.0116	384	395	427	438	416	421	412	432	400	374	437
11	1.0116	387	380	381	432	443	421	425	416	437	405	379
12	1.0034	381	394	378	382	433	445	422	427	418	438	406
Pre-K		132	138	124	128	117	115	123	116	116	116	116
k-4		1962	1957	1902	1900	1891	1814	1829	1807	1770	1767	1770
5-8		1668	1662	1659	1643	1597	1623	1556	1540	1564	1492	1482
9-12		1546	1589	1619	1664	1708	1693	1686	1670	1625	1649	1566
k-12		5176	5208	5180	5207	5197	5130	5071	5017	4959	4908	4838
Total All		5308	5346	5304	5335	5314	5245	5194	5133	5075	5024	4954
Change			-42	31	-21	-70	-51					

Calculation based on cohort survival method - **HOUSING GROWTH NOT YET INCLUDED**

Live Birth Data from Town Clerk 2017 forward, **2023 births forward is estimated, 273 reported thru 9/30**

children born, but not yet enrolled

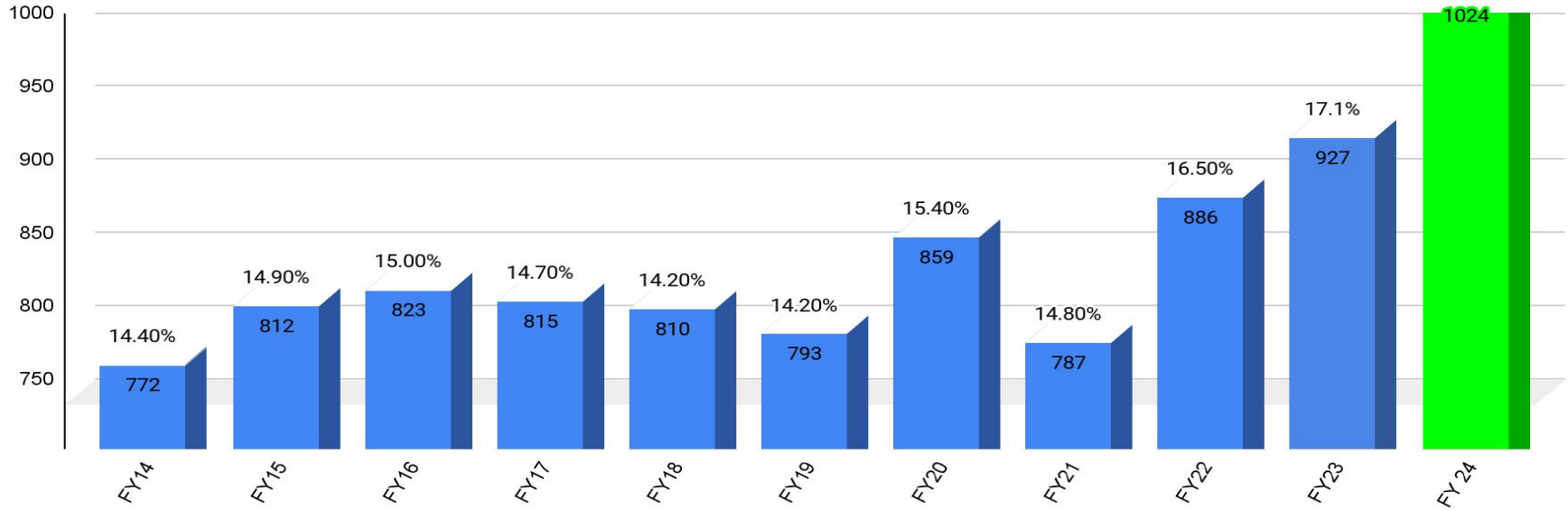
Shaded birth rates and enrollment projection data based on estimated births;

Multiplier is a **THREE** year average from most recent history available, **COVID** year and prior not factored in

Most other cohorts based on 5 yr average, COVID shutdown, housing market and sharp rise in 30-yr fixed mortgage make 3 yr a better model

SPECIAL EDUCATION ENROLLMENT

Students with Disabilities and % of Total Population



Statewide: 19.4



Student Services FY23 versus FY24

As reported 12/31/23

Type of service	FY23	FY24 (mid)	% increase
IEP	927	1024	10.5% ?
504	285	281	TBD
EL	210	259	23% ?
McK-V	45	65	44% ?



FY 24 NEW POSITIONS

PROPOSED NEW STAFF ADDITIONS (GENERAL FUND)	
5.0 FTE Library Media Specialists @ M+5	\$340,920
1.0 FTE KMS Video Art Performance Teacher	\$68,184
.5 FTE Memorial Vice Principal	\$56,000
1.0 FTE Middle School French Teacher	\$68,184
.1 FTE Art Teacher - Memorial	\$9,080
5.0 FTE Instructional technology coaches	\$340,920
1.0 FTE Data Manager	\$95,000
Family Engagement Registrar (from Level 3 to Level 1 Admin)	\$28,483
TOTAL	\$1,006,771



FY 24 PREVIOUS GRANT POSITIONS MOVED TO THE GENERAL FUND

Reading SP	\$19,045	Para	\$15,593
Reading SP	\$91,278	Para	\$16,213
Reading SP-district wide reading specialist	\$100,200	SLPS (Speech & Language Pathologist)	\$36,059
Reading SP	\$95,224	IT	\$46,503
Reading SP	\$93,333	KMS Interventionist	\$29,650
English Workshop (LA-NHS)	\$48,492	KMS Interventionist	\$21,668
EF Tutor-Study Halls Jr/Sr's	\$16,334	WMS Interventionist	\$30,221
French	\$19,997	WMS Interventionist	\$31,931
SS	\$82,726	Guidance Counselor at BEN-HEM	\$63,644
Gambia	\$11,021	ELL - Lilja	\$68,184
Math	\$70,911	Director SEL & Equity	\$158,100
Math	\$91,278	Asst Dir Athletics	\$31,620
ELA	\$70,911	MS Testing SPED Teacher	\$53,681
ELA	\$82,726	MS Testing SPED Teacher	\$52,373
BCBAS	\$34,092	VP MES	\$56,230
Behav Teachers	\$17,040	VP Brown	\$65,264
Behav Teachers	\$17,551	LES	\$109,744
Behav Teachers	\$18,885	Counselor BES (22 pay cycles)	\$27,265
Para	\$16,213	Counselor LES	\$71,594
Para	\$15,593	METCO	\$51,000
Para	\$15,315	EF Tutor	\$33,705
Para	\$14,722	EF Tutor	\$28,823
Para	\$15,593	Art Teacher	\$8,774
Para	\$15,593	BH & Brown PE	\$47,681
		Music Teachers	\$22,117
		PE LES (TBD)	\$11,920
		TOTAL	\$2,263,629



FY 24 New Positions Funded by Circuit Breaker**

PROPOSED NEW STAFF ADDITIONS (CIRCUIT BREAKER)	
Memorial SPED Coordinator (+.5 fte)	\$34,092
Paraprofessionals (3.0 fte)	\$86,952
School Psychologist (1.0 fte)	\$68,184
Assistive Technology Assistant (.6 fte)	\$17,390
Paraprofessional (.6 fte)	\$17,390
Elementary EL Teacher (1.0 fte)	\$68,184
Program Coordinator (1.0 fte)	\$68,184
Elementary Testing Evaluator (1.0 fte)	\$68,184
SPED Teachers (2.0 fte)	\$136,368
TOTAL	\$564,929

**No financial impact to the General Fund



THE ROAD TO THE 2023 SATM APPROPRIATION REQUEST

FY24 Operational Budget 2/27/23 =	\$ 84,712,725
FY24 Town Proposed Appropriation 2/1/23 =	\$ 83,279,134
Variance =	(\$1,433,591)
Use of additional circuit breaker reimbursement	+ <u>\$1,433,591</u>



\$ 0



Overview of recent new staffing (FY22-24)

- Increased need for student services (special education, EL)
- Elementary Library Media Specialists
- Elementary Assistant Principals
- Elementary and Middle School Math Coaches
- Elementary Math Interventionists
- Digital and Personalized Learning (SEL and Pedagogy)
- Elementary School Counselors
- Math, French, Art, Music
- Director of Social and Emotional Learning and Equity



FY25 Preliminary Budget

SALARY OR NON-SALARY	NPS Categories	Sum of FY23 Actual	Sum of FY24 ORIGINAL APPROP	Sum of FY25 LS Budget Request	Sum of FY25 LS Dollar Change	% Change from FY24
SALARIES	ADMIN & SUPPORT	\$ 3,687,484	\$ 3,773,551	\$ 4,054,171	\$ 280,621	7.4%
	INSTRUCTION	\$ 57,333,271	\$ 59,231,202	\$ 65,202,101	\$ 5,970,899	10.1%
	ATHLETICS& ACTIVITIES	\$ 1,300,715	\$ 967,708	\$ 1,201,585	\$ 233,877	24.2%
	HEALTH SERVICES	\$ 1,131,949	\$ 1,132,451	\$ 1,281,758	\$ 149,307	13.2%
	FACILITIES	\$ 60,000	\$ -	\$ -	\$ -	0.0%
	TECHNOLOGY	\$ 168,550	\$ 192,247	\$ 195,600	\$ 3,353	1.7%
	BENEFITS & EQUIP	\$ 30,650	\$ 30,118	\$ 35,658	\$ 5,540	18.4%
SALARIES Total		\$ 63,712,618	\$ 65,327,277	\$ 71,970,873	\$ 6,643,597	10.2%
NON-SALARY	ADMIN & SUPPORT	\$ 646,556	\$ 1,113,115	\$ 1,201,045	\$ 87,930	7.9%
	INSTRUCTION	\$ 2,947,444	\$ 3,381,111	\$ 3,403,708	\$ 22,597	0.7%
	ATHLETICS& ACTIVITIES	\$ 235,718	\$ 111,872	\$ 110,678	\$ (1,194)	-1.1%
	HEALTH SERVICES	\$ 148,886	\$ 165,140	\$ 195,140	\$ 30,000	18.2%
	FACILITIES	\$ 2,395,243	\$ 3,108,734	\$ 2,719,750	\$ (388,984)	-12.5%
	TECHNOLOGY	\$ 1,004,326	\$ 1,098,900	\$ 1,149,650	\$ 50,750	4.6%
	BENEFITS & EQUIP	\$ 3,235	\$ 3,332	\$ 3,332	\$ (0)	0.0%
	TRANSPORTATION	\$ 3,249,400	\$ 3,280,817	\$ 4,744,066	\$ 1,463,249	44.6%
	TUITIONS	\$ 4,602,983	\$ 5,688,836	\$ 4,370,860	\$ (1,317,976)	-23.2%
NON-SALARY Total		\$ 15,233,791	\$ 17,951,857	\$ 17,898,228	\$ (53,629)	-0.3%
Grand Total		\$ 78,946,409	\$ 83,279,134	\$ 89,869,102	\$ 6,589,968	7.9%



Staffing changes for FY25

Elementary

- 3.0 Professional Support (related to Johnson closure)
- 4.0 Instructional Support
- + 1.0 Special Educator (specialized program)

Middle School

- 1.0 Classroom Teacher (decreased enrollment)
- 3.0 WMS will move to KMS (shifted enrollment)
- + 1.0 Student Services (EL)

High School

- + .5 Classroom Teachers (EL, math, health and wellness)

Central Administration

- 3.0 (Administration, finance, and operations)



FY25 Budget Revised 3/8/24

Salary or Non-Salary	FUNCTION ROLL UP	FY23 Actual	FY24 ORIGINAL APPROP	Sum of FY25 LS Budget Request	Dollar Change	% Change
SALARIES	ADMINISTRATION	\$ 3,687,484	\$ 3,773,551	\$ 4,054,171	\$ 280,620	7.4%
	INSTRUCTION	\$ 57,333,271	\$ 59,231,202	\$ 65,202,101	\$ 5,970,899	10.1%
	ATHLETICS& ACTIVITIES	\$ 1,300,715	\$ 967,708	\$ 1,201,585	\$ 233,877	24.2%
	HEALTH SERVICES	\$ 1,131,949	\$ 1,132,451	\$ 1,281,758	\$ 149,307	13.2%
	TECHNOLOGY	\$ 168,550	\$ 192,247	\$ 195,600	\$ 3,353	1.7%
	BENEFITS & EQUIP	\$ 30,650	\$ 30,118	\$ 35,658	\$ 5,540	18.4%
	Net Reductions			\$ (644,969)		
SALARIES Total		\$ 63,712,618	\$ 65,327,277	\$ 71,325,904	\$ 5,998,627	9.2%
NON-SALARY	ADMINISTRATION	\$ 646,556	\$ 1,113,115	\$ 1,201,045	\$ 87,930	7.9%
	INSTRUCTION	\$ 2,947,444	\$ 3,381,111	\$ 3,403,708	\$ 22,597	0.7%
	ATHLETICS& ACTIVITIES	\$ 235,718	\$ 111,872	\$ 110,678	\$ (1,194)	-1.1%
	HEALTH SERVICES	\$ 148,886	\$ 165,140	\$ 195,140	\$ 30,000	18.2%
	FACILITIES	\$ 2,395,243	\$ 3,108,734	\$ 2,719,750	\$ (388,984)	-12.5%
	TECHNOLOGY	\$ 1,004,326	\$ 1,098,900	\$ 1,149,650	\$ 50,750	4.6%
	BENEFITS & EQUIP	\$ 3,235	\$ 3,332	\$ -	\$ (3,332)	-100.0%
	TRANSPORTATION	\$ 3,249,400	\$ 3,280,817	\$ 4,744,066	\$ 1,463,249	44.6%
	TUITIONS	\$ 4,602,983	\$ 5,688,836	\$ 4,370,860	\$ (1,317,976)	-23.2%
NON-SALARY Total		\$ 15,233,791	\$ 17,951,857	\$ 17,894,896	\$ (56,961)	-0.3%
Grand Total		\$ 78,946,409	\$ 83,279,134	\$ 89,220,800	\$ 5,941,666	7.1%



Overview of FY25 Budget Funding Gap

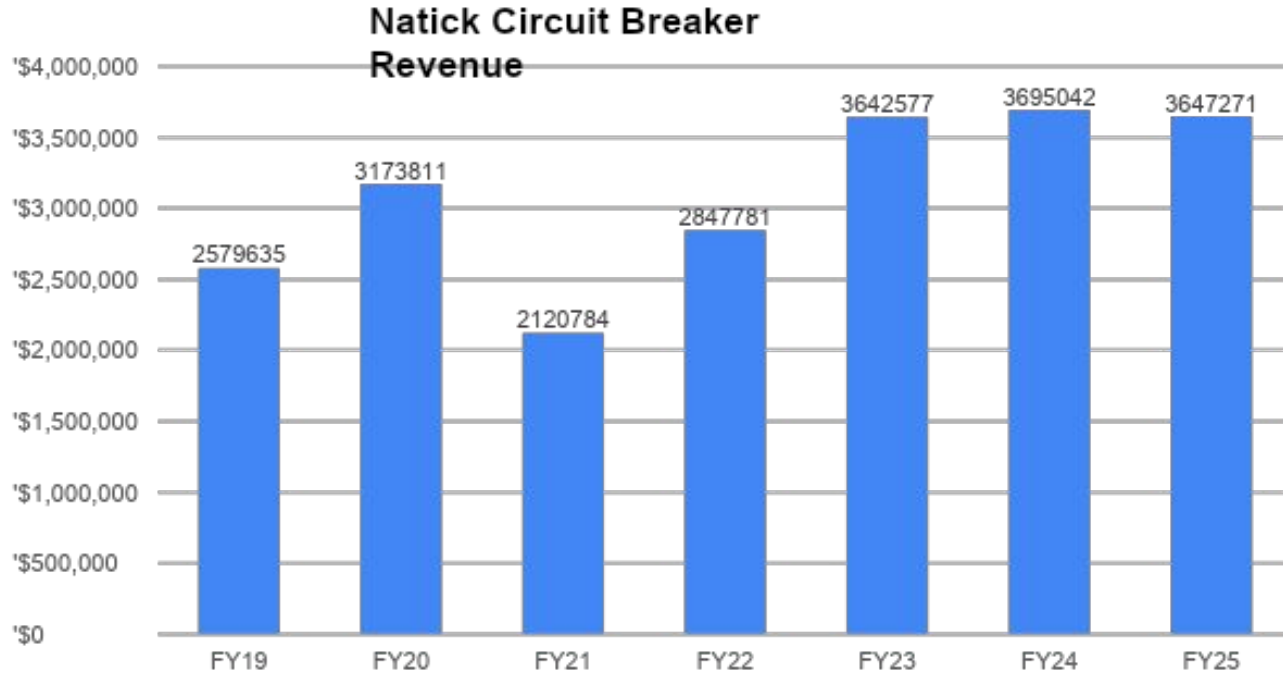
Original FY24 Appropriation	83,279,134	
FY25 level service at 7.9%	89,869,102	[incl CB offset = 3,381,994]
Difference	6,589,968	
Proposed available funding 4.22%	3,516,165	86,795,299 [Incl 1.6 mi ARPA]
Bus .52%	429,844	
Remainder	2,643,959	
	2,000,000	Additional CB offset
	+149,780	Improvements
		137,280 SS
		12,500 Gen'l Education
	793,639	Remaining Gap
	- 793,639	Staff reductions and savings due to closure of Johnson
Revised FY25 Budget at 7.1%	0.00	Remaining Gap



Entitlement Grant Summary

Grant Name	FY21	FY22	FY23	FY24	FY25 Est.
ESSER 1	\$ 279,511	\$ -	\$ -	\$ -	\$ -
ESSER III	\$ 464,968	\$ -	\$ -	\$ -	\$ -
ESSER III	\$ -	\$ 1,022,514	\$ -	\$ -	\$ -
Title II - A - Teacher Quality	\$ 86,820	\$ 85,836	\$ 86,906	\$ 77,194	\$ 77,194
Title II :ELA Acquisition -EL Migrant	\$ 25,654	\$ 26,952	\$ 25,166	\$ 32,777	\$ 32,777
Federal: IDEA	\$ 1,277,806	\$ 1,335,270	\$ 1,373,398	\$ 1,488,851	\$ 1,488,851
ARP: SPED	\$ -	\$ 305,273	\$ -	\$ -	\$ -
Early Childhood Special Ed - Fed	\$ 33,559	\$ 34,003	\$ 35,975	\$ 36,934	\$ 36,934
ARP: SPED Early Childhood	\$ -	\$ 28,447	\$ -	\$ -	\$ -
ARP: Homeless	\$ -	\$ 9,010	\$ -	\$ -	\$ -
Title I	\$ 198,875	\$ 206,448	\$ 464,052	\$ 210,028	\$ 210,028
Title IV, Part A: Student Support & Enrichment	\$ 24,749	\$ 10,000	\$ 14,772	\$ 34,005	\$ 34,005
Total Entitlements	\$ 2,391,942	\$ 3,063,753	\$ 2,000,269	\$ 1,879,789	\$ 1,879,789
% Change From Prior Year		28%	-35%	-6%	0%

Circuit Breaker Revenue History





CIRCUIT BREAKER OVERVIEW

- To be received in FY24: 3,695,042
- Projected use of circuit breaker for FY24: 3,943,821
- Projected amount to carry forward to FY25: 2,700,000
- Projected to be received in FY25: 3,647,271 (at 70% Reimb)
- Projected offset for FY25: 5,381,994
- Projected remaining in FY25 to carry forward to FY26: 965,277
- Projected to be received in FY26 will be less than for FY25 due to decrease in tuition costs in FY25



ADDITIONAL INFO BY SELECTED COST CENTERS

[Overview of Proposed FY25 Technology Budget](#)

ITEM TITLE: Approve the Adoption of Specialized Code as Specified in the Warrant
Article for Spring Town Meeting

DATE:

ITEM TYPE:

ITEM SUMMARY:

BACKGROUND

INFORMATION:

RECOMMENDATION:
