

Acton Public, Acton-Boxborough Regional and Boxborough School Committees

March 1, 2012 at 7:00 p.m.

**Joint APS/AB/Boxborough School Committee Meeting
followed by APS/AB Regional SC Meeting
followed by AB Regional SC Meeting,
followed by APS School Committee Meeting
at the R.J. Grey Junior High Auditorium**

**ACTON PUBLIC and ACTON-BOXBOROUGH REGIONAL
SCHOOL COMMITTEE MEETINGS (with Boxborough School Committee)**

**Library
R.J. Grey Junior High School**

**March 1, 2012
7:00 pm Joint APS, ABR and Boxborough SC Meeting
followed by Joint APS, ABR SC Meeting
followed by AB SC Meeting
followed by APS SC Meeting**

AGENDA with addendum

1.0 JT APS/AB REGIONAL SC CALL TO ORDER (7:00)

2.0 CHAIRMAN'S INTRODUCTION

3.0 STATEMENT of WARRANT

4.0 APPROVAL of MINUTES

4.1 JT SC Budget meeting, January 28, 2012 (*addendum*)

4.2 JT SC meeting, February 2, 2012 (*next meeting*)

5.0 PUBLIC PARTICIPATION (7:05)

Boxborough School Committee call to order.

6.0 JOINT SCHOOL COMMITTEE BUSINESS (7:10)

6.1 EDCO Discussion re Compliance with Pending Collaborative Legislation with ABRSC, APS SC and Boxborough SC – *Dorsey Yearly, EDCO Executive Director, Curtis Bates, Steve Mills, Xuan Kong*

6.1.1 Memo from EDCO Executive Director, Dorsey Yearly

6.2 Regional School District Study Committee (RSDSC) Update – *Xuan Kong* (7:25)

6.2.1 Upcoming Presentations

6.2.2 Warrant Article for Acton Town Meeting

6.2.3 Additional RSDSC materials found at:

<https://sites.google.com/site/abregionalstudycmt/>

Boxborough School Committee adjourns. Joint APS/AB Regional SC continues.

6.3 Policy Subcommittee Update (7:40)

6.3.1 Use of Electronic Messaging by School Committee Members File: BHE – **SECOND READING** – *Brigid Bieber*

6.3.2 Remote Participation by Committee Members File: XX – **FIRST READING** – *Brigid Bieber*

6.3.3 Pregnant/Parenting Students File: JIE – **FIRST READING** – *Liza Huber*

6.3.4 Fuel Efficient Vehicles File: DJ – text clarification **VOTE** – *JD Head*

6.3.4.1 Proposed revision with memo (*addendum*)

6.3.4.2 MA DOER Green Communities Grant Program, Fuel Efficient Vehicles Criteria 4, revised 10/17/11

6.4 AEA Coaching and Activities Stipend (Schedule B) revision – **VOTE** – *Marie Altieri* (7:55)

6.4.1 AEA / NSC Proposal Slides, 2/2/12 (*revised with attachment*)

- 6.5 New Massachusetts Educator Evaluation Process – *Marie Altieri* (8:00)
 - 6.5.1 Standards for Administrators
 - 6.5.2 Standards for Teachers
 - 6.5.3 New Massachusetts Frameworks for Educator Evaluation, *slides*
- 6.6 Superintendent Evaluation – *Marie Altieri* (8:10)
 - 6.6.1 Implementation Guide for Superintendent Evaluation, January 2012
 - 6.6.2 Appendix A: Superintendent Rubric, January 2012
 - 6.6.3 Previously used process and rubrics
- 6.7 ALG Report – *John Petersen/Xuan Kong* (8:20)
 - 6.7.1 Draft minutes of 2/16/12 and 1/30/12 meetings
- 6.8 BLF Report – *Maria Neyland (oral)* (8:25)
- 6.9 Acton FinCom Report – *John Petersen/Xuan Kong (oral)*
- 6.10 Acton Health Insurance Trust (HIT) Report – *John Petersen* (8:30)
 - 6.10.1 Guidance for Acton HIT HMO Premiums FY13, *J. Petersen*
 - 6.10.2 HIT Report on Rate Setting – February 2012
- 6.11 Health Insurance Working Group Update - *Marie Altieri* (8:35)
 - 6.11.1 Health Insurance Memo of Agreement
(*Originals will be brought to meeting for signature*)
 - 6.11.2 Meeting minutes are found at:
<http://www.acton-ma.gov/Archive.aspx?AMID=142&Type=&ADID=>
- 6.12 Other Postemployment Benefits (OPEB) – *Don Aicardi, John Petersen* (8:40)
 - 6.12.1 Establishing Trust Account – **VOTE** (*addendum*)
 - 6.12.2 MA General Laws, Ch. 32B: Section 20 (*addendum*)
 - 6.12.3 OPEB Presentation slides (*addendum*)
- 6.13 Town Elections – *John Petersen (oral)*(8:45)
 - Acton election is March 27th. 3 School Committee candidates running for 2 seats:
Dennis Bruce, Adria Cohen, Deanne O’Sullivan
 - Boxborough deadline is April 2nd for filing nomination papers. Election is May 21.

APS SC is suspended. AB SC continues.

- 7.0 AB SCHOOL COMMITTEE BUSINESS (8:50)
 - 7.1 FY12 Budget – 2nd Quarter Report – *Don Aicardi* (*addendum*)
 - 7.2 Lower Fields Project Update – *Steve Mills (vote at 3/22/12 SC meeting)* (9:05)
 - 7.2.1 Draft Memorandum of Understanding between AB Regional School District and the Friends of the Lower Fields (FOLF) (*revised in addendum*)
 - 7.2.2 Draft FOLF Lower Field Programming Agreement
 - 7.3 FY’13 Budget Update – *Steve Mills/ Don Aicardi* (9:15)
 - 7.3.1 Recommendation to Approve revised FY’13 ABRSD Budget and Assessments – **VOTE** – *Steve Mills (addendum)*
 - 7.4 New Arts Graduation Requirement – **VOTE** - *Deborah Bookis* (9:25)
 - 7.4.1 Memo from D. Bookis
 - 7.4.2 John Maeda: Innovation is born when art meets science, *Tom Lamont*
<http://www.guardian.co.uk/technology/2010/nov/14/my-bright-idea-john-maeda>
 - 7.4.3 Your Life in 2020, *John Maeda*
http://www.forbes.com/2010/04/08/john-maeda-design-technology-data-companies-10-keynote_print.html
 - 7.4.4 Cultivating the Imagination, *Martha Nussbaum*
<http://www.nytimes.com/roomfordebate/2010/10/17/do-colleges-need-french-departments/cultivating-the-imagination>
 - 7.5 Recommendation to Approve ABRHS Exchange Trip to France, Fall 2012/Spring 2013 – **VOTE** – *Steve Mills* (9:40)

7.6 Recommendation to Approve ABRHS Community Service Learning Trip to Peru – **VOTE** –
Steve Mills

8.0 FOR YOUR INFORMATION (9:45)

8.1 ABRHS

8.1.1 Discipline Report, February 2012 (*next meeting*)

8.1.2 ABRHS Child Development Preschool 2012-2013 posted at
<http://ab.mec.edu/> (*addendum*)

8.1.3 Concussion Information

8.1.4 Knowing the Score on Concussions graph, B. Globe 2/19/12 (*addendum*)

8.2 RJ Grey Junior High

8.2.1 Discipline Report, February 2012 (*next meeting*)

8.2.2 Project Wellness, March 21, 2012

<http://ab.mec.edu/rjweb/projectwellness.shtml>

8.3 Pupil Services

8.3.1 ELL Student Population, February 1, 2012

8.4 Monthly ABRSD Financial Reports

8.5 Monthly Enrollment Report – February 1, 2012

8.6 Acton 2020 Presents “The Plan” – March 6th at 7:00 pm, Acton Town Hall

8.7 Pledge Case Update – *Steve Mills (oral)*

8.8 Correspondence from the Community

8.9 School Committee Invitations: 20 Year Chair Ceremony, March 21st at 5PM
All Staff Retirement Party, June 7th at 3PM

AB Regional SC adjourns. APS SC is reconvened.

9.0 ACTON PUBLIC SCHOOL COMMITTEE BUSINESS (9:50)

9.1 Recommendation to Approve revised FY13 APS Budget – **VOTE** – *Steve Mills (addendum)*

9.1.1 Early Childhood Services memo re Boston Globe article “Special Needs
Preschoolers on Rise in Boston”, *Liza Huber (addendum)*

10.0 NEXT MEETINGS:

March 15 – 7:00 pm, APS SC meeting at GATES SCHOOL

March 22 – 7:30 pm, JT/ABR/APS SC meeting at RJ Grey JH Library

April 2 – Acton Town Meeting begins

May 3 – 7:30 pm, ABRSC meeting at RJ Grey JH Library

May 14 – Boxborough Town Meeting begins

May 17 – 7:00 pm, APS SC meeting at CONANT SCHOOL

ADJOURN – 10:00 PM

**ACTON PUBLIC and ACTON-BOXBOROUGH REGIONAL
SCHOOL COMMITTEES
Draft Minutes**

School Department FY'13 Budget Presentation

**Library
R.J. Grey Junior High School**

January 28, 2012

**9:00 a.m. – 1:45 p.m. Joint SC Budget Presentations
1:45 – 3:00 Acton Public SC Budget Presentations**

<i>Members Present:</i>	Brigid Bieber, Dennis Bruce, Mike Coppolino, Xuan Kong, Kim McOsker, Paul Murphy, Maria Neyland, John Petersen, Bruce Sabot
<i>Members Absent:</i>	none
<i>Others:</i>	Don Aicardi, Marie Altieri, Deborah Bookis, Liza Huber, Steve Mills, Beth Petr, Principals, APS and AB staff members, members of the Acton and Boxborough Finance Committees, Acton and Boxborough Boards of Selectmen and the public

Chair John Petersen called the Acton-Boxborough Regional School Committee to order and Chair Mike Coppolino called the Acton Public School Committee to order at 9:04 a.m.

1. Superintendent's Introduction

Dr. Mills welcomed everyone and introduced the budget presentations. The almost 200 slides are posted at <http://ab.mec.edu/about/meetings.shtml>

2. FY'13 Budget Overview

Finance Director, Don Aicardi, began by stating that the Administration is optimistic about revenue for next year, but cautiously so. It will be a more austere time requiring a true team effort to get through. Regarding Other Post-Employment Benefits (OPEB), this issue has been building for some time and is a liability across the Commonwealth. Serious discussion in the near future will include setting up a trust account at both the Town and the Region for this purpose.

Bruce Sabot noted that as a regional school district, the overall student population of our schools is declining and the revenue percentage from Boxborough is also declining. He expressed concern that people might blame Boxborough that the dollar shift is happening due to Boxborough's declining enrollment, but overall the pot of money is still the same. John Petersen recognized Bruce's comment as an important one, stating, "We all need to keep in mind that we are here to serve Acton and Boxborough."

3. Pupil Services

Director of Pupil Services, Liza Huber, began with a cartoon illustrating the highly unpredictable nature of special education services. Referring to slide 11, she stated that the day's focus is the top area of the cost triangle. She spoke about always striving for a continuum of services. The Connections Program continues to grow and was proposed at the High School for next year. This could mean that some students may be brought back into the High School and may prevent some from going out of district. The circuit breaker reimbursement funding was budgeted at 42% and received at 65% for the current year, creating important resources. Liza emphasized that program development within the district is key to controlling costs. She also emphasized that districts are required to meet the legal mandate.

Early identification and intervention pays off for students who need special education services, making our preschool program essential to our overall plan. When asked about the Connections program's relationship

with other special education programs, Liza explained that Connections does not deliver services, but it is a support for those students who need it. A member stated that while it is a good concept, he was trying to understand the cost benefit. Liza said that Connections is a support program, to help students access regular education. Without this type of support program, some of the special education needs for specific students would be higher because they would require other individual services. When asked if any of the \$187,000 could be eligible for circuit breaker reimbursement, Liza said she would have to cost out each student's program to see, but that it was not likely. When asked if any of the services could be sold to CASE or other groups to generate additional revenue, Liza said that this would only be if we have space available after accepting our own students. For many of our specialized programs the Districts do offer them to other communities who pay us. Liza emphasized that providing intensive services early means a greater possibility of not needing that level of intensity, or in some cases the service at all, as the children grow.

Liza was asked what makes her comfortable with the 65% reimbursement number included in the proposed budget. She said it is based on history and having good communication with people at the state level as well as our own Administrators including Finance Director, Don Aicardi and Our of District Coordinator, Matt Kidder. When asked what will happen if funding ends up less than 65% next year, Liza said that she will work with it and is always looking at how adjustments can be made given the changing nature of special education services.

Nancy Sherburne, Sped PAC Co-chair, spoke from the audience. She asked how many students are currently at the High School who might benefit from a Connections program. Liza said there are 20 – 25 students right now at ABRHS. Programming for these students is now being done on an individual basis, often meaning contracting with highly skilled professionals. Starting our own program, could reduce some of these services needed for those students to succeed. Liza also pointed out that there is legislation proposed requiring a licensed transitional specialist to be in place. If this passes, our staff will have to be trained at significant expense.

Allen Nitschelm spoke from the audience asking about the slide showing FTEs. Liza explained that the more expensive professional staff are at the top and the less expensive, non-professional staff are at the bottom of the chart. Steve Mills stated that many of these slides are from the Department of Elementary and Secondary Education (DESE) website. He thanked Liza and her staff for being so cost efficient.

4. Human Resources

Marie Altieri, Director of Human Resources, began by noting the many recent changes to health insurance costs this year, including some just a few days ago. The Acton Board of Selectmen will consider a proposal on Monday night. ALG will also discuss this on Monday. Information is in the School Committee packet. A one page handout with details of the new plan design proposal was distributed. John Petersen noted the progress made in getting all of the school and town unions to accept the proposed health care plan design changes. It is a huge accomplishment, led by Marie.

Marie spoke about student enrollment, emphasizing that Acton and Acton-Boxborough are still on page one of the state student-teacher ratio listings – with one of the highest ratios, a real weakness in our districts. It was noted how frustrating this statistic has always been for our School Committees. Declining enrollment will help a little. Chapter 70 state funding will not be increasing this year for the first time.

The demographics of our staff over the next few years were discussed. Marie said typically we have had 14 or 15 retirees for several years, K-12. She predicted 7 for the next 2 years and we currently have only 4 retirees that we are aware of at this time.

The Enrollment Projection slide was shocking to some, but not unique to Acton. The Region dropped 34 students this year. APS dropped 60 students in FY'11 and 60 more students in FY'12. Kindergarten

registration for the general public will be in mid March. Enrollment is projected at 280 for Kindergarten in September.

5. Technology

Amy Bisiewicz, Director of Educational Technology, began with a video of students talking about their enthusiasm for the Smart Boards. Brigid Bieber was happy to see how much of Amy's efforts are tied in to the Long Range Strategic Planning goals.

Xuan Kong stated that the Blanchard School in Boxborough has many more computers per student than Acton schools have because they have a strong source for donations. He asked if the districts could start a campaign to look for donations, so new equipment does not have to be purchased regularly. Amy will contact Anne Kingan and see if the School to Business Partnership can help.

Dennis Bruce asked about the \$65,819 per year for 4 years proposed to refresh the APS Mac computers with operating software. Amy confirmed this saying that with the new machines i-books can be used and the Mac app store is very good. Teachers can download things like the i-book author and publish students' books, and more. It was noted that this platform also provides us an avenue to address textbooks that could affect our long range plan. John stated that technology is not "if" it will happen, but "when". When asked when she expects e-books to be a significant option for textbooks, Amy said that it depends on building principals, teachers, parents and policies, acknowledging that there is lots of work to be done in this area. Preparations include getting the schools' wireless access ready to meet these demands.

Mike Coppolino cautioned the Committee not to succumb to "the lease is up and here are some new boxes". He feels if another year or two could be squeezed from the current machines, there is a real advantage to waiting before purchasing new ones.

Clint Seward spoke from the audience, advocating for the schools to stay up to speed with the technology that kids are now using and loving. His grandchildren all have computing devices and really know how to use them. Amy invited everyone to take a look at the digital textbooks on her iPad during the break.

6. Curriculum

Deborah Bookis, Director of Curriculum and Assessment, began by thanking the Committee on behalf of the elementary schools for the textbooks purchased for FY'11. She then highlighted the Professional Learning work done this year, including an "extraordinary event" with Dr. Barry Fishman from the University of Michigan last summer that really pushed the staff's learning and was well received.

The amount of money spent on professional development in our two districts in the past has put us in the bottom of the state lists. A conscious effort has been made this year to start to address this issue. Mike Coppolino said that given finite funds, if he had a dollar to spend, he would put it into professional development for the staff. He said that studies indicate that the best place to get "bang for the buck" is in professional development.

One member noted that the NEASC Report comments are recommendations, not requirements. Xuan asked about the time component for members participating in professional development. He asked who pays for the substitutes when staff is out. Deborah said that 7% of her budget is for professional learning. The Committee talked about early release days. The late starts/early dismissals reduce the amount of substitutes needed. These new schedule changes at the Junior High and High School have been well received by the staff.

7. Acton-Boxborough Regional High School

Principal Alixe Callen presented the proposed budget for the High School given the context of the District's Long Range Strategic Plan, NEASC Recommendations, Technology Needs, and her building based goal to Enhance Social Capital. She outlined the current High School Initiatives, at no cost: learning

goals, seminar groups, advisory, English electives, Arts requirement, Google Apps, Global learning, Saturday night activities, Green flag, and Anti-bullying.

Her prioritized personnel requests for FY13 included: 1. 1.0 Counselor, 2. 2.0 English Teachers, and 3. 1.0 Special Education Assistant (completion of the Hayward Center). Dr. Callen also shared the unfunded (not proposed) personnel/program/capital needs that she and her staff feel are important to keep in mind.

8. R.J. Grey Junior High School

Principal Craig Hardimon presented the proposed budget for the Junior High. Current RJGJHS initiatives include: Learning Goals, Second Step (Bullying and Teasing prevention curriculum), Literacy across the curriculum, MOBI, Textbook Rollout (7th grade Spanish and 8th grade math), and Protocols (Critical Friends and Lesson Study). His proposed budget priority was adding a .2 FTE Drama teacher to bring the current teacher to full time. His unfunded personnel needs were to add an Academic Support Center Teacher and Assistant Teacher, followed by replacing a 12 year old PC lab with a 30 station mobile cart. This priority was followed by an unfunded request for an after-school Homework Club stipend and a Physical Education Assistant Teacher. Unfunded capital needs included: science tables and stools, 8 thirty station netbook labs and a digital project system.

Questions were addressed to Alixe and Craig together. Differences between the Academic Support Centers at the Jr High and High School were discussed. A member asked if the district had looked into classes being held at different times, varying the schedules. Craig said one issue is transportation, and also that kids are very busy after school. Alixe said that with the 8 period day at the High School, students generally take 5 classes. She wants to be sure that students don't feel like they can't participate fully in school life because they need academic support. The High School's NEASC Report recommended that adding counselors be higher priority than adding staff to the Academic Support Center, but it is also mentioned. Of the 4 english teachers who left the High School last year, none said the class load was the primary reason, but they all did mention it. Alixe stated that the single thing that she has seen change the most over the past 18 years is a decline in the social and emotional health of students.

John Petersen said that the need that the schools have for a technology vision that marries home, school and education is upon us and the impacts on the budget are large. Alixe said the districts have a tremendous advantage now with their relationship with google and ABSchools.org. Giving every student a school email address and access to google docs has significantly improved student communication and connection with the teachers and staff.

John also noted that the "LRSP" at the bottom of many of the slides is about strategy. John thanked the Long Range Strategic Planning Committee for the ability to discuss a budget that is tied to a well thought out plan like this.

A break for lunch was taken at 12:30.

9. Facilities

Director of Facilities, J.D. Head thanked everyone for supporting his efforts in Facilities and Transportation. He recommends suspending the roof replacement plan for another year. He has been very involved in the proposed Lower Fields Project. He noted the increasing programmatic demands outside of the school day on existing infrastructure including: Acton Chinese Language School, Danny's Place, Sports, and High School Saturday Night events. He also has a request to expand the existing physical infrastructure (AC). He expects to save \$25,000 minimum for FY12 by switching solid waste vendors.

Electricity consumption continues to decline as highlighted dramatically in Slide 12 comparing December 2010 break use and December 2011 break use. Natural gas use also has declined. While there are many social benefits to cutting energy consumption, J.D. has a business view and when the limit is reached,

business wise, he will make it clear. He is proud that students understand what is happening and are impacting and leading this change.

Several Committee members asked about the \$68,000 grant that funded the Energy Advisor position this year. While it was stated that the current person is making a great impact, this position was funded because the APS district originally received a grant from the state, then from NSTAR. Moving this expense for FY13 to the appropriated budget is a “philosophical issue” for Xuan. He feels that when a position is funded by a grant, and later moves to the appropriated budget, it becomes much tougher to not fund. J.D. stated that this is a value judgement and reminded the Committee of the money that the Facilities department has saved and returned to be used to purchase textbooks, technology, and more to further the education of our students. Mike Coppolino asked J.D. why this advisor should be full time, and what the ongoing benefits of the position would be. JD replied that he and his current staff have more than they can do right now. Steve Mills stated that there is clear history that this position saves money.

10. Finance

Director of Finance, Don Aicardi discussed recent staff changes due to the “ferocity of hours” required to get the work done. A new Administrative Assistant was added during FY12 and is now in the FY13 budget. This is budgeted .25 FTE for Finance and .75 FTE for Central Office support. An existing Finance Admin Assistant was converted to a Finance Specialist position. These changes have been very successful. A new, additional Finance Budget Analyst position is requested in the proposed FY13 budget. This proposal is to realign staff to fully comply with State requirements and reflect today’s workload, expectations of higher scrutiny, and conformity to required sound business practices. Don’s plan is also to improve the quantity and quality of higher level analysis for the Finance Director, the Superintendent, other School Administrators, the School Committees and the public. Don also pointed out that we are not in 100% compliance with MA State Law Chapter 71, Section 16B with regard to the separation of some of our regional school district financial transactions. The proposed solution is to shift some treasury responsibilities from the Business Coordinator to the Finance Specialist, who is now under the direction of our part time Treasurer.

11. Community Education

Erin Bettez, Director of Community Education presented although Community Education does not receive funding from the appropriated budget. Erin complimented Sally Cunningham’s ability to bring a new perspective to the programs. Enrollment is down but revenue is up this year. Erin described the difficult decision to eliminate less popular programs. After 4 years, the catalogue has been tightened up and expense reporting has been improved. When asked for an approximate number for Community Education revenues, Erin said it was about \$400,000.

ABRSD BUDGET DISCUSSION

Steve Mills said that while there are many educational needs that should be filled, only the essentials are being proposed.

John Petersen said that while direct instruction is important, the backroom/Central Office must be kept in good order. He strongly supports a more robust level of support and analytical analysis. Xuan Kong asked for clearer justification for all new FTE requests. Mike Coppolino said this was one of the most interesting School Committee presentations he has seen. He recognized John Petersen’s advocacy a few months ago to address the Health care issues and now all will benefit from it. He also thanked Xuan for his leadership on the Long Range Strategic Plan.

Jonathan Chinitz spoke from the audience. After thanking the staff and School Committees for the presentations, he urged them to remind the public about the unfunded needs so they are not forgotten.

Brigid Bieber stated that while the Connections program is not being proposed for funding at the High School, it could be justified. She also said that the 2 additional English teachers at the High School as well

as the drug/alcohol counselors and additional counselors are all justified but not being asked for. She recognized that this is the reality of our budget, but emphasized that these are all very real needs affecting our kids today.

The Acton-Boxborough Regional School Committee adjourned at 1:55 p.m.

The Acton Public School Committee Meeting continued at 2:00 p.m.

ACTON PUBLIC SCHOOLS BUDGET PRESENTATION

Steve Mills introduced the panel: Liza Huber - Director of Pupil Services, Deborah Bookis - Director of Curriculum and Assessment, Damian Sugrue - Conant Principal, Christopher Whitbeck – Douglas Principal, Lynne Newman – Gates Principal, David Krane – McCarthy-Towne Principal, Edward Kaufman – Merriam Principal, Mark Hickey – Performing Arts Director, Diana Woodruff – Visual Arts Director, and Mary O’Brien – Physical Education Teacher.

The FY13 proposed APS Investment Budget includes:

Staff:

- \$108,000 In Classroom Assistants (\$21,600 per school)
- .4 FTE ELE teacher (\$26k)
- FTE SPED Teacher New Resource Room at Douglas (\$56k)
- .8 FTE Music Specialist (\$45k)
- FTE Physical Ed (\$58k)
- .6 FTE Art Specialist (\$43k)

Other:

- .5 FTE Budget Analyst (\$30k)

plus Health Insurance For Six Potential New Positions EST (\$89k) for a **TOTAL of \$487,000**

Liza Huber stated that the recent Coordinated Program Review recommended an increase in staffing for our ELE program. Chris Whitbeck spoke about the need for an additional special education teacher at Douglas. Currently, he is creating one-to-one programs for some students whose needs are not met in the mainstream classroom. Although the students are having a good experience, it is not cost efficient. It is hoped that adding this new special education teacher/coordinator at Douglas will also prevent students from being moved from school to school for services.

Steve Mills said that it was astounding to him when he came to our district that APS has never had a full time teacher for art, music and physical education. Fundamentally, he considers this being understaffed. Deborah Bookis introduced Mark, Diana and Mary who shared the difficulties of not having full time staff in their disciplines. A new arts graduation requirement will be proposed to the Regional School Committee in March. These requests are supported by the new Long Range Strategic Plan.

APS Budget Discussion

The Committee appreciated the need for art, music and physical education resources, but as enrollment declines and sections are reduced, a member asked what the plan will be as our student population goes down. Steve Mills responded that the current requests are to complete something that should have been done a long ago.

The Committee had many questions about the Douglas special education teacher addition and whether it was to establish a new program or a resource to address current student need. Liza said that it is part of a

broader program involving emotional and behavioral issues and that ideally a new program would be established.

John Petersen asked, in terms of school choice, what guidance is given to parents on how a specific school can serve a child's special education needs. Liza replied that because specialized programs exist in four of the five elementary schools, when a child is found eligible and needs are identified, a discussion of what programs and in what school they are in takes place. This comes up in the team meeting process and early in the transition process. When asked how significant a problem it is that some children are identified before they start school, while others are identified when they are in school, Liza explained that all schools have a continuum of learning centers and programs. Because more specialized needs are more complex, sometimes the priority becomes the service delivery and needs over the culture of the school. A problem used to be that a program and school were recommended and after a family becomes involved, the child has to switch schools because their program ended and he/she has to go to another school to continue the services. The Committee asked for more specific information on this proposed position at Douglas at their next APS meeting.

Nancy Sherburne, AB SpedPAC co-chair, spoke about the difficulty of these particular students to switch schools and transition in the middle of their elementary school experience.

Liza stated that the additional .4 ELE teacher will provide direct service to Gates students where the need is identified.

When asked, Steve Mills stated that this budget adds \$108,000 for assistants to the \$108,000 that was added this year. He would like to get to the equivalent of one assistant per grade level to relieve some of the pressure on the PTO fundraising. He noted that the Merriam School has a different philosophy that requires assistants. This money is designed not to increase the number of assistants, but to decrease the PTO funding of assistants already there. Several committee members emphasized the importance of the ratio of trained adults to students in buildings.

Mary Ann Ashton spoke from the audience. She asked if the specialist proposal would add more direct instruction time for students. Deborah Bookis said it would not add to music, art and PE class time, but it would benefit the broader school community, and improve the quality of service and student assessment. This addition would give more opportunity for quality art and music in the classroom, not solely in art or music classes.

The Acton Public School Committee adjourned at 3:18 p.m.

Respectfully submitted,
Beth Petr

List of documents used:
Agenda attached
Handout from Marie Altieri regarding Health Insurance



February 23, 2012

To: Member School Committees of the EDCO Collaborative and the Education Collaborative for Greater Boston, Inc.

From: Dorsey Yearley, Executive Director

Re: Governance Issues Related to the EDCO Collaborative and the Education Collaborative for Greater Boston, Inc.

Today, the Massachusetts Legislature sent a bill to the Governor's Office regarding the oversight of educational collaboratives. As a result of this legislation, the Boards of the EDCO Collaborative (EDCO) and the Education Collaborative for Greater Boston, Inc. (ECGB, Inc.) must implement a plan to separate both the Boards and the administration of our two agencies within the next several months.

Background Information

In 1969, ECGB, Inc. was formed by a consortium of school districts that were interested in sharing resources to address the needs of at-risk students. This consortium was incorporated as a private charitable corporation because at that time, there was no other legal mechanism to support public school collaborations. Subsequent to the passage of the enabling legislation to create public collaboratives, the Board of ECGB, Inc. voted in 1988 to create a partner public collaborative, EDCO, to complement the work of the private charitable corporation. For over 20 years, these two partner agencies have shared a common mission and have been governed by overlapping Boards and administration. Currently, EDCO provides all services related to supporting public school students and educators, including professional development, special education services, and three state funded contract programs. ECGB, Inc. provides services to the Archdiocese of Boston, acting as the fiscal agent for the Boston Public Schools for NCLB entitlement monies, and to the Wrentham Developmental Center, through a contract with the Department of Developmental Services to provide therapies to the residents.

Board Action

Knowing that the legislation was imminent, the Board established an Ad Hoc Committee last fall made up of Superintendents and School Committee members, as well as the Executive Director and Darren Klein, EDCO's legal counsel, to research and make recommendations to the Board for future action. To date, this Committee has met six times, including a meeting with the Deputy Commissioner of DESE, the State Ethics Commission, and the House Chair of the Joint Committee on Education.

Additionally, the Committee directed our counsel to ask for an Advisory Opinion from the State Ethics Commission regarding potential conflict of interest for the overlapping Boards. The Advisory Opinion, which was received on January 17, 2012, supports our counsel's opinion that the EDCO and ECGB, Inc. Boards can make decisions about the transfer of programs and assets or about the dissolution of one of the agencies without a conflict of interest. This opinion paves the way for the respective Boards to review and consider several options for meeting the requirements of the new law.

In order to meet the requirements of the new law, the Boards of both agencies must consider one of three options:

- separate the agencies completely and leave the contracts, programs and assets of both in tact
- close the private not-for-profit agency, terminate the contracts and programs and distribute the assets
- close the private not-for-profit agency, transfer the contracts and programs to the public collaborative and distribute the assets

An analysis of each option has led the Ad Hoc Committee to recommend closing the private not-for-profit corporation and transferring the contracts, programs and assets to the public collaborative. It is their opinion that this option best preserves member services and EDCO's cost efficiency. This option would maintain the contribution from the contracts of approximately \$250,000 to EDCO's operating overhead; minimize the immediate unemployment liability that would be incurred by terminating the contracts; and continue to allow access to the Seefurth Fund, a gift to ECGB, Inc. in 1974 to be used for educational purposes. The Seefurth Fund currently has a balance of \$1.2 million that is accessed by EDCO to offset the cost of selected professional development offerings to member districts.

The potential costs of this option include an increase in contributions to the EDCO Retiree Benefit Trust, which could be offset by an allocation of some of the cash assets from ECGB, Inc. at the time of dissolution. In addition, there is a possible future unemployment liability if the contract with DDS is not continued, but the impact of this possibility could be mitigated by potential savings in benefits costs realized by the transfer of the contracts. It is important to note that five other educational collaboratives provide adult services through contracts with DDS, and that both DDS and the Collaborative Boards view these services as an appropriate extension of their collaborative mission.

At the February 9, 2012 Board Meetings of the two agencies, the Boards approved a motion to continue to explore the option of dissolving ECGB, Inc. and of transferring the contracts, programs and assets from ECGB, Inc. to EDCO by the close of the fiscal year on June 30, 2012. The Boards have requested a full report on this matter at the March 8, 2012 Board Meetings, at which time each Board will vote on a final recommendation. The dissolution of ECGB, Inc. requires a two-thirds vote by the Member Districts, which includes the twenty school districts that are also members of EDCO and the Archdiocese of Boston. The subsequent distribution of the contracts, programs and assets may be done by the respective Boards.

Member School Committee Responsibility:

Pending the final action of the EDCO and ECGB, Inc. Boards on March 8, 2012, we are requesting that each school district review and vote on the following motion:

"I move that the _____ School Committee vote to dissolve ECGB, Inc. by June 30, 2012 or as soon as legally possible thereafter, and further that our representatives for EDCO and ECGB, Inc. be authorized to take all necessary steps to transfer all programs, contracts and available assets, including the Seefurth Fund, from ECGB, Inc. to EDCO by the close of the fiscal year on June 30, 2012, or as soon as legally possible thereafter."

Please contact me if you have any questions. Thank you in advance for your attention to this issue.



EDCO and ECGB, Inc. at a glance:

Education Collaborative for Greater Boston, Inc.

Founded 1969

Board: *2 Voting Members from each District, both a Superintendent and a School Committee Member*

Member Districts:

*Acton
Acton-Boxborough Regional
Arlington
Bedford
Belmont
Boxborough
Brookline
Carlisle
Concord
Concord-Carlisle Regional
Lexington
Lincoln
Lincoln-Sudbury Regional
Newton
Sudbury
Waltham
Watertown
Wellesley
Weston
Winchester
Archdiocese of Boston*

Budget: *\$3.4 million*

Programs:

*Seefurth Fund
State and Federal Contract Programs:
- BPS/Archdiocesan Program
- Wrentham Habilitative Services*

EDCO Collaborative

Founded 1988

Board: *1 Voting Member from each District, either a Superintendent or School Committee Member*

Member Districts:

*Acton
Acton-Boxborough Regional
Arlington
Bedford
Belmont
Boxborough
Brookline
Carlisle
Concord
Concord-Carlisle Regional
Lexington
Lincoln
Lincoln-Sudbury Regional
Newton
Sudbury
Waltham
Watertown
Wellesley
Weston
Winchester*

Budget: *\$10.8 million*

Programs:

*Special Education Tuition Programs
Special Member Programs
Special Education Transportation
EDCO Seefurth Education Center
(providing professional development)
LABBB Management
State and Federal Contract Programs:
- Special Education Surrogate
Parent Program (with FCSN)
- EDCO Youth Alternative
- MA Migrant Education Program*



Education Collaborative for Greater Boston, Inc.

Governance Changes Required by New Collaborative Legislation

Presented to the Acton, Acton-Boxborough
and Boxborough School Committees
March 1, 2012

Dorsey Yearley, Executive Director

ECGB, Inc. and EDCO Today

**Education Collaborative for
Greater Boston, Inc.**
*21 Member Districts
2 Voting Board Members per District*

Programs:

- Seefurth Fund
- BPS/Archdiocesan Program
(NCLB Titles I & II)
- Wrentham Habilitative Services

EDCO Collaborative
*20 Member Districts
1 Voting Board Member per district*

Programs:

- Special Education Programs
- Special Member Programs
- Special Ed Transportation
- Professional Development
- LABBE Management
- State and Federal Contracts
 - Surrogate Parent Program
 - EDCO Youth Alternative
 - Mass Migrant Education

**Joint administration for both
EDCO and ECGB, Inc.**

Proposed New Structure

EDCO Collaborative

20 Member Districts

1 Voting Board Member per district

Administration and Programs

- Special Education Programs
- Special Member Programs
- Special Education Transportation
- Professional Development
- Seefurth Fund
- LABBB Management
- State and Federal Contracts
 - Surrogate Parent Program
 - EDCO Youth Alternative
 - Mass Migrant Education
 - BPS/Archdiocesan Program (NCLB Titles I & II)
 - Wrentham Habilitative Services

Decision Making Process

- Thorough and transparent procedures
- Oversight agencies involved
- Requires action by both Boards and by Member Districts

Cost/Benefit Analysis

- Maintaining v. Dissolving Private Agency
- Moving v. Terminating Contracts and Programs
- Merging Two Agencies into One Agency

Next Steps

- Boards will vote on final recommendation on March 8, 2012
- Member School Committees must vote on proposal to dissolve the private agency
- Boards will vote on any further required actions on May 10, 2012

*Acton-Boxborough Regional School District
Acton, MA 01720*

PLEASE POST

**Meetings of the
Acton-Boxborough Regional School
Committee's Regional School District
Study Committee (RSDSC) Subcommittee**

=====

- February 27 @ 7:55pm w/ Acton Board of Selectmen (BoS) @ Acton Town Hall, Rm 204
- March 12 @ 7:30 pm w/ Boxborough BoS and FinCom @ Boxb Town Hall Grange
- March 14 @ 7:00 pm Forum in Parker Damon Building Cafeteria, Acton
- March 29 @ 11:00 am Forum in Boxborough Town Hall Grange
- March 29 @ 7:00 pm Forum in Boxborough Town Hall Grange

Agenda:

Present findings of the Study Committee regarding possible regionalization of Acton and Boxborough schools, pre-k through 12, and Gather input from local community

**ARTICLE ____ SENSE OF THE MEETING - REGIONAL SCHOOL DISTRICT
STUDY COMMITTEE OF THE ACTON-BOXBOROUGH
REGIONAL SCHOOL COMMITTEE – DRAFTING OF A NEW
PRE-K TO GRADE 12 REGIONAL SCHOOL AGREEMENT**

It is the sense of Town Meeting that the ActonBoxborough Regional School Committee direct the Regional School District Study Committee to draft a regional agreement between Acton and Boxborough that would include grades pre-kindergarten through 12 for approval at 2013 annual town meeting.

Or take any other action relative thereto.

Summary

Last fall the Acton-Boxborough Regional School Committee formed the Regional School District Study Committee to consider the viability of expanding the current regional school district to include grades pre-K through 12. The Committee is composed of three members from Acton and three members from Boxborough and they have been meeting bi-weekly since October to identify whether there are benefits to regionalizing pre-K through grade 12 and whether the benefits outweigh any perceived costs. The Committee has analyzed the current operating and educational environment as well as changes that would occur with full regionalization. The Committee has also evaluated other pre-K to 12 districts, and identified educational, organizational, governance, and financial issues and implications of full regionalization and reported back to the Regional School Committee in early February with preliminary findings. Their report identified potential financial benefits in the range of \$700,000 or more, as well as other potential organizational and educational benefits.

The Regional School Committee has directed the Regional School District Study Committee to continue its work and bring a sense of town meeting resolution to both Acton and Boxborough town meetings this year. The purpose of this vote is to obtain a sense of each community's desire to proceed with full regionalization, understanding that the final Town Meeting vote to do so will not occur for up to one year or more while the issue is studied further and a revised regional agreement is drafted. Because significant work would need to be done to draft a new agreement and begin the planning of full regionalization, the School Committee believes that it is important to get a sense from both towns as to whether they should proceed at this point in time with the goal of bringing forward a new agreement by next year.

DRAFT

File: BHE

USE OF ELECTRONIC MESSAGING BY SCHOOL COMMITTEE MEMBERS

As elected public officials, School Committee Members shall exercise caution when communicating between and among themselves via electronic messaging services including, but not limited to, electronic mail (e-mail), Internet web forums and Internet chat rooms.

Under the Open Meeting Law, deliberations by a quorum of members constitutes a meeting. Deliberation is defined as movement toward a decision, including, but not limited to, the sharing of an opinion regarding business over which the Committees have supervision, control, or jurisdiction. A quorum may be arrived at sequentially using electronic messaging without knowledge and intent by the author.

School Committee members should use electronic messaging between and among members only for housekeeping purposes such as requesting or communicating agenda items, meeting times, or meeting dates. Electronic messaging should not be used to discuss Committee matters that require public discussion under the Open Meeting Law.

Under the Public Records Law, electronic messages between public officials may be considered public records and therefore are subject to the record retention requirements of that law. Accordingly, in order to be sure e-mail communications between and among School Committee members are captured and retained through the Districts' electronic archiving system:

-The District will establish individual e-mail accounts for each school committee member;

-School Committee members will make every effort to utilize the District e-mail address exclusively for sending and receiving any and all school committee related communications including, but not limited to, communications to and from other school committee members, members of the Districts' staff and administration and members of the public;

- School Committee Members will not forward their District e-mail to any other third party e-mail accounts, as this may impact the Districts' ability to capture School Committee related e-mails for record retention purposes,

-In any case where it is impracticable or impossible for a School Committee member to utilize their District e-mail address to send an e-mail, and the member utilizes a private e-mail account, the School Committee Member will provide an electronic copy of the School Committee related e-mail to the District e-mail "shell address" as soon as practicable.

LEGAL REF.: M.G.L. 4:7; 39-23A, 23B; 66:10

Acton Public Schools and Acton-Boxborough Regional School District

6.3.1.

2/2/12

JT SC mtg

FIRST READ

3/1/12

JT SC mtg

SECOND READING

Deleted: . Therefore, in order to ensure compliance, the School Committee chairperson, in consultation with the Superintendent of Schools, shall annually designate a member of the central office staff who shall be copied on all electronic correspondence between and among members of the School Committee. These copies shall be printed and retained in the central office in the same fashion as any other School Committee records. School Committee members who do not have a computer or access to

Deleted: these messages shall be provided copies on a timely basis.¶

File: XXX

REMOTE PARTICIPATION

(DRAFT 2/16/12)

The School Committees recognize the need for members occasionally to be physically absent from School Committee Meetings and therefore adopt the following policy to govern remote member's remote participation in School Committee Meetings.

Minimum Requirements for Remote Participation.

- (a) Members who participate remotely and all persons present at the meeting location shall be clearly audible to each other;
- (b) A quorum of the School Committee, including the chair or, in the chair's absence, the person authorized to chair the meeting, shall be physically present at the meeting location.
- (c) Members who participate remotely may vote and shall not be deemed absent for the purposes of M.G.L. c. 39, sec. 23D.

Permissible Reasons for Remote Participation. The School Committee Chair, or in the chair's absence, the person chairing the meeting, must determine that one or more of the following factors makes the School Committee member's physical attendance unreasonably difficult:

- (a) Personal illness;
- (b) Personal disability;
- (c) Emergency;
- (d) Military service; or
- (e) Geographic distance.

Technology.

- (a) The following media are acceptable methods for remote participation. Remote participation by any other means is not permitted. Accommodations shall be made for any public body member who requires TTY service, video relay service, or other form of adaptive telecommunications.
 - (i) telephone, internet, or satellite enabled audio or video conferencing,
 - (ii) any other technology that enables the remote participant and all persons present at the meeting location to be clearly audible to one another.
- (b) When video technology is in use, the remote participant shall be clearly visible to all persons present in the meeting location.
- (c) The School Committee Member who is absent from the Meeting will notify the District Administration with as much advance notice as possible and will work with the District Administration to establish the appropriate technology to effect the School Committee Member's remote participation.
- (d) The chair or, in the chair's absence, the person chairing the meeting, may decide how to address technical difficulties that arise as a result of utilizing remote participation, but is encouraged, wherever possible, to suspend

discussion while reasonable efforts are made to correct any problem that interferes with a remote participant's ability to hear or be heard clearly by all persons present at the meeting location. If technical difficulties result in a remote participant being disconnected from the meeting, that fact and the time at which the disconnection occurred shall be noted in the meeting minutes.

(e) The costs attributable to equipment or service relating to the District's ability to communicate with the remote participant will be born by the District. The personal costs of the participant attributable to equipment or service relating to the remote participant's ability to communicate with the District will be born by the participant. If the costs associated with remote participation become prohibitive, the School Committee will reevaluate its policy on remote participation.

Procedures for Remote Participation.

(a) Any member of a public body who wishes to participate remotely shall, as soon as reasonably possible prior to a meeting, notify the chair or, in the chair's absence, the person chairing the meeting, of his or her desire to do so and the reason for and facts supporting his or her request.

(b) At the start of the meeting, the chair shall announce the name of any member who will be participating remotely and the reason under 940 CMR 29.10(5) for his or her remote participation. This information shall also be recorded in the meeting minutes.

(c) All votes taken during any meeting in which a member participates remotely shall be by roll call vote.

(d) A member participating remotely may participate in an executive session, but shall state at the start of any such session that no other person is present and/or able to hear the discussion at the remote location, unless presence of that person is approved by a simple majority vote of the public body.

(e) When feasible, the chair or, in the chair's absence, the person chairing the meeting, shall distribute to remote participants, in advance of the meeting, copies of any documents or exhibits that he or she reasonably anticipates will be used during the meeting. If used during the meeting, such documents shall be part of the official record of the meeting, and shall be listed in the meeting minutes and retained in accordance with M.G.L. c. 30A, sec. 22.

LEGAL REFERENCES: M.G.L. c. 30A, sec. 25 (a) and (b), MASS 940 CMR 29.00

DRAFT

6.3.3

File: JIE

PREGNANT/PARENTING STUDENTS

Pregnant and parenting students have a right to equal educational opportunities and their rights are fully protected by a federal law known as Title IX. The Acton Public Schools and the Acton-Boxborough Regional School District encourage any students who may be pregnant or who are parenting a child to inform their school counselor, the school nurse, or another appropriate school official, who will assist them and who will help ensure that they have full access to the same academic and extracurricular programs available to all students.

Should a physician deem it inadvisable for a pregnant student to attend school for an extended period of time, all services granted to home bound students under School Committee policies shall be made available.

3/1/12
JTSC mtg
FIRST READ

*Office of Facilities and Transportation
Acton Public and Acton-Boxborough Regional Schools
978-264-4700 ext. 3225
<http://ab.mec.edu/departments/facilities/facilities.shtml>*

TO: Steve Mills
FROM: J.D. Head and Kate Crosby
DATE: 2/27/12
RE: Fuel Efficient Vehicles Policy (DJ)

We write to ask for consideration of a revision to the wording of our Fuel Efficient Vehicles Policy (File: DJ). This matter will affect Acton's eligibility for the upcoming round of funding through the competitive Green Communities grant process. Eligibility requirements (of which this is one) must be satisfied by **March 16**. The deadline for the actual grant application which will follow is March 30.

In the spring of 2010, the School Committees adopted a "Fuel Efficient Vehicle Policy" as part of the process of Acton becoming designated as a Green Community through the Massachusetts Department of Energy Resources (DOER). This designation resulted in \$150,794 in grant funding being received by the Town of Acton, including funding for the Energy Advisor position within the school districts. (Boxborough is not eligible for this Green Communities designation as they purchase their electricity from the local Littleton Electric Light Department; the program was designed for municipalities served by the larger utilities such as NSTAR.)

The original policy approved on 5/6/10 specified MPG guidelines for classes of vehicles. Those MPG guidelines have recently been revised by DOER, which is appropriate as vehicles on the market are shifting towards greater efficiency.

The shortest path toward compliance with these new DOER requirements (and thus access to potential competitive grant funding) is for adoption of a revised "Fuel Efficient Vehicle Policy" that does not reference specific MPG values, but instead references "the most recent guidance for Criteria 4 published by the MA Department of Energy Resources' Green Communities Division." Adoption of this alternate wording means that the policy can remain standing with no further action needed as DOER revises its MPG guidelines in the future. The proposed policy is being reviewed by the Policy Committee.

Attached is a related guidance document from DOER which is also found at link: <http://www.mass.gov/eea/docs/doer/green-communities/grant-program/gc-criterion4-guidance.pdf>. Appendix A contains a model policy for the ABRSC's consideration. Appendix C contains a "Sample School Adoption Letter" for notifying DOER of adoption of the policy by a regional school district. There is also language specific to Regional School Districts on page 2 of the guidance document.

We are happy to answer any questions you may have. Thank you for your consideration.

File: DJ

FUEL EFFICIENT VEHICLES
(proposed revision 2/27/12)

In an effort to reduce the Acton Public School District and Acton-Boxborough Regional School Districts' (the "Districts") fuel consumption and energy costs going forward, the Districts intend to purchase only fuel efficient vehicles whenever such vehicles are commercially available and practicable.

Guidelines

The Districts will maintain an annual vehicle inventory for non-exempt vehicles and a plan for replacing these vehicles with vehicles that meet, at a minimum, the fuel efficiency ratings contained in the most recent guidance for Criteria 4 published by the MA Department of Energy Resources' Green Communities Division. The vehicle inventory will include the following information: Model, Make, Model Year, Year Purchased, Drive system, Weight Class, MPG, Annual Miles Driven, Total Fuel Consumption, Vehicle Function.

Deleted: the required fuel efficiency guidelines as required by the Massachusetts Department of Energy Green Communities Program, as revised from time to time.

Fuel Efficient Vehicle Replacement Plan

The Districts shall develop a plan to replace all non-exempt vehicles with fuel efficient vehicles as described above. Said plan shall outline the process by which the Districts will replace vehicles and set goals for when the existing fleet will be replaced and reviewed.

Exemptions

Leased school busses and heavy duty vehicles such as public works trucks are exempt from this policy.

Inquiries

Inquiries regarding this policy should be directed to the Superintendent or his/her designee.

LEGAL REFERENCE:

<http://tiny.cc/greenEPA>

<http://tiny.cc/criteria>

<http://tiny.cc/vehicles>

APPROVED 5/6/10

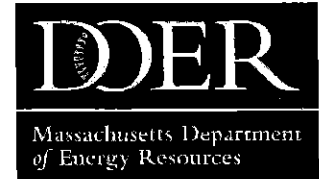
Acton Public Schools and Acton-Boxborough Regional School District

10/17/2011



GREEN COMMUNITIES
GRANT PROGRAM
GUIDANCE

Fuel efficient Vehicles

Criteria **4**

INTRODUCTION

Criteria Four of the Green Communities Program states that communities must purchase only fuel-efficient vehicles for municipal use whenever such vehicles are commercially available and practicable. The purpose behind this criterion is to reduce carbon dioxide emissions by municipal vehicles, which has a positive impact on the environment and saves the municipality money.

As background, the US Environmental Protection Agency's Green Vehicle Guide states that:

Vehicles with lower fuel economy create more carbon dioxide - the most prevalent greenhouse gas - than vehicles with higher fuel economy. Every gallon of gasoline your vehicle burns puts about 20 pounds of carbon dioxide into the atmosphere because air has weight and mass, and it takes a lot of it to burn a gallon of gasoline. One of the most important things you can do to reduce your contribution to global warming is to buy a vehicle with higher fuel economy. The difference between 25 miles per gallon and 20 miles per gallon can amount to the prevention of 10 tons of carbon dioxide over a vehicle's lifetime. Buying a more fuel efficient vehicle will also will help to reduce our nation's dependence on fossil fuels. And of course, you will save money by having to fuel up less often.

COMPLIANCE

To meet this criterion, municipalities need to adopt a written, efficient fleet policy (by local official or body with authority to enact policies) that requires their departments and divisions to purchase only fuel efficient vehicles (**See Appendix A, model policy**). Both general government and school districts are required to enact a fuel efficient vehicle policy for a municipality to meet this requirement, and letters documenting adoption must be provided, signed by the appropriate municipal authorities as noted below. Letters from other municipal officials are not acceptable.

For the letters from the general government and school district:

- **General Government** – The general government must provide a letter from the Chief Executive Officer of the city or town stating that it has adopted the Fuel Efficient Vehicle Policy.

The Chief Executive Officer is defined as the manager in any city having a manager and in any town having a city form of government, the Mayor in any other city, and the Board of Selectmen in any other town unless some other officer or body is designated to perform the functions of a Chief Executive Officer under the provisions of a local charter or laws having the force of a charter.

- **Public School Districts** - For a municipality to meet this requirement, its public school district must provide a letter from the School Superintendent stating that it has adopted the Fuel Efficient Vehicle Policy. Please note that even if the school only has exempt vehicles, adoption of the Policy by the school must be provided in the event that the school does acquire non-exempt vehicles in the future.
- **Regional School Districts** – Regional School Districts are not required to be part of a municipality's Green Communities designation application. However, for regional school districts that wish to be part of a municipality's Green Communities designation (with approval by the municipality), the regional school district must also adopt the Fuel Efficient Vehicle Policy and provide a letter from the Superintendent stating that it has adopted the Policy.

Sample adoption letters are provided in Appendices B and C.

In addition, the municipality is required to develop and maintain a vehicle inventory for all vehicles. A plan for replacing exempt vehicles with vehicles that meet the fuel efficiency ratings below must also be developed and maintained. This inventory of all vehicles and replacement plan for exempt vehicles must include school vehicles. The fuel efficiency ratings are set to ensure that at least 5 or more automatic transmission models of mass production are available for sale in Massachusetts (all from affordable brands; no luxury brands). Based on 2010 EPA data, vehicles are to have a combined city and highway MPG no less than the following:

- 2 wheel drive car: 29 MPG
- 4 wheel drive car: 24 MPG
- 2 wheel drive small pick-up truck: 21 MPG
- 4 wheel drive small pick-up truck: 19 MPG
- 2 wheel drive standard pick-up truck: 17 MPG
- 4 wheel drive standard pick-up truck: 16 MPG
- 2 wheel drive sport utility vehicle: 21 MPG
- 4 wheel drive sport utility vehicle: 18 MPG

Hybrid or electric vehicles in these vehicle classes will meet these criteria

To inform your purchasing decisions, information on makes and models of vehicles including fuel economy comparisons can be found at: <http://www.fueleconomy.gov/>

***NOTE:** The EPA maintains a database on vehicle fuel efficiency that is updated occasionally throughout the year, as new models are released. As increasing numbers of fuel efficient vehicle models are released the

minimum combined MPG requirements of the Green Communities Act will be revised upwards. Thus, cities and towns must check for updates prior to ordering new vehicles.

In order to encourage efficient driving practices municipalities are required to implement a monitoring system to record miles driven, fuel consumption, etc. for each vehicle in every department. A monitoring system will help facilitate the municipality's reduction in aggregate energy consumption. If a municipality provides fuel for fleet vehicles it should consider using one of the universal fleet cards available on the market today that provide a monitoring system for tracking fuel use.

VEHICLE RECYCLING

Recycling of vehicles is only allowed if the replacement vehicle meets the fuel efficient criteria listed above. Please be advised that a recycled Ford Crown Victoria does not meet the MPG rating and therefore would not meet fuel efficient vehicle requirements. When a town is ready to retire a Crown Victoria police vehicle, fleet disposal companies can provide an attractive option.

EXEMPTIONS

Vehicles that are exempt from municipal Efficient Fleet Policies include heavy-duty vehicles defined as having a manufacturer's gross vehicle weight rating (GVWR) of more than 8,500 pounds. Examples include fire engines, ambulances, and some public works vehicles. In addition, police cruisers, passenger vans, and cargo vans are exempt from this criterion. However, municipalities must commit to purchasing fuel efficient cruisers, passenger vans, and cargo vans when they become commercially available. Police and fire department administrative vehicles **MUST** meet fuel efficient requirements.

Emergency Response vehicles that are under 8,500 pounds and for which there are fuel efficient models available are **NOT** exempt.

ALTERNATIVE COMPLIANCE

If a municipality has a vehicle fleet composed of only exempt vehicles (e.g. heavy-duty vehicles and/or police cruisers), it must propose alternative means of reducing vehicle fuel consumption in order to comply with this criterion. This could include having in place policies and programs that reduce vehicle fuel consumption such as: carpooling incentives for municipal employees; preferred parking for employees with hybrid vehicles; bicycle racks at municipal buildings; incentives to encourage employees to bike to work; or a bicycle sharing program for employees to travel within the municipality. Alternative compliance can also be provided through the installation of electric vehicle charging stations. Use of alternative fuels such as biodiesel blends from B-5 to B-20 for heavy duty fleets are also encouraged as part of an alternative compliance plan.

A municipality must note that should it acquire non-exempt vehicles in the future, it is committed to purchasing non-exempt vehicles that meet the most recent guidance for Criteria 4 published by the MA Department of Energy Resources' Green Communities Division

A vehicle inventory of exempt vehicles must be provided.

10/17/2011

APPLICABILITY

All communities seeking Green Communities designation must adopt a fuel efficient vehicle policy that reflects the most recent MPG criteria published in this Guidance. If a municipality has adopted a policy that reflects old mpg criteria it must have done so within the 6 months immediately preceding issuance of revised Guidance in order to qualify for credit under this criterion when it is applying for designation. All designated Green Communities must review their Fuel Efficient Vehicle Policy on an annual basis and ensure that it reflects DOER's most recently published MPG minimums. The Annual Reporting required of Green Communities will include this information.

FOR MORE INFORMATION

Website:

www.mass.gov/energy/greencommunities

For fleet questions, contact

Stephen Russell, stephen.russell@state.ma.us

This sample policy was prepared to assist cities and towns in developing a fuel efficient vehicle policy. This model policy is intended for illustration purposes, communities are free to utilize the format provided.

APPENDIX A

Municipality / School District	
MODEL FUEL EFFICIENT VEHICLE POLICY	
Effective Date	
Revisions	
Approval Date	
Effective Date	

FUEL EFFICIENT VEHICLE POLICY

DEFINITIONS

Combined city and highway MPG (EPA Combined fuel economy): Combined Fuel Economy means the fuel economy from driving a combination of 43% city and 57% highway miles and is calculated as follows:

$$=1/((0.43/\text{City MPG})+(0.57/\text{highway MPG}))$$

Drive System: The manner in which mechanical power is directly transmitted from the drive shaft to the wheels. The following codes are used in the drive field:

- AWD = All Wheel Drive: four-wheel drive automatically controlled by the vehicle powertrain system
- 4WD = 4-Wheel Drive: driver selectable four-wheel drive with 2-wheel drive option
- 2WD = 2-Wheel Drive

Heavy-duty vehicle: A vehicle with a manufacturer's gross vehicle weight rating (GVWR) of more than 8,500 pounds.

POLICY STATEMENT

In an effort to reduce the (city/town/school district/other local entity)'s fuel consumption and energy costs the (policy making body) hereby adopts a policy to purchase only fuel efficient vehicles to meet this goal.

PURPOSE

To establish a requirement that the (city/town/school district/other local entity) purchase only fuel efficient vehicles for municipal/school use whenever such vehicles are commercially available and practicable.

APPLICABILITY

This policy applies to all divisions and departments of the (city/town/school district/other local entity)

GUIDELINES

All departments / divisions shall purchase only fuel-efficient vehicles for municipal use whenever such vehicles are commercially available and practicable.

The (city/town/school district/other local entity) will maintain an annual vehicle inventory for non-exempt vehicles and a plan for replacing these vehicles with vehicles that meet, at a minimum, the fuel efficiency ratings contained in the most recent guidance for Criteria 4 published by the MA Department of Energy Resources' Green Communities Division. The fuel efficiency ratings contained therein are based on the most recently published US Environmental Protection Agency combined city and highway MPG ratings for vehicles.

This Green Communities' Guidance for Criteria 4 must be checked for updates prior to ordering replacement vehicles.

Exemptions

- Heavy-duty vehicles. Examples include fire-trucks, ambulances, and some public works trucks that meet the definition of Heavy-duty vehicle.
- Police cruisers, passenger vans and cargo vans are exempt from this criterion as fuel efficient models are not currently available. However, we commit to purchasing fuel efficient police cruisers, passenger vans and cargo vans when they become commercially available. Police and fire department administrative vehicles are NOT exempt and must meet fuel efficient requirements.

10/17/2011

Inventory

The following information shall be included in a vehicle inventory list and said list shall be updated on an annual basis:

Model	Make	Model Year	Drive System: 2 WD, 4WD or AWD	Year/month Purchased	> 8500 pounds? (Y or N)	Exempt or non-exempt	MPG Rating	Vehicle Function

NOTE: Departments/Divisions may use EPA combined MPG estimates or actual combined MPG.

FUEL EFFICIENT VEHICLE REPLACEMENT PLAN

The (city/town/school district/other local entity) shall develop a plan to replace all non-exempt vehicles with fuel efficient vehicles as defined above. Said plan shall outline the process by which the (city/town/school district/other local entity) will replace vehicles, set goals for when the existing fleet will be replaced and review said plan on an annual basis.

QUESTIONS / ENFORCEMENT

All other inquiries should be directed to the department/division responsible for fleet management and/or fleet procurement. This policy is enforced by the Chief Administrative Officer and/or their designee(s)

10/17/2011

Appendix B
Sample town adoption letter

Letter must be on Town Letterhead

**MA Department of Energy Resources
Green Communities Division
100 Cambridge Street – Suite 1040
Boston, MA 02114**

{date of letter}

At a public Board of Selectmen meeting held on [DATE], the Board of Selectmen voted to adopt the attached Fuel Efficiency Vehicle Policy.

Thank you.

Signature and Typed Name of Chair

10/17/2011

Appendix C
Sample School Adoption Letter

Letter must be on School letterhead

MA Department of Energy Resources
Green Communities Division
100 Cambridge Street – Suite 1040
Boston, MA 02114

{date of letter}

Please be advised that the Public Schools of [Town] hereby adopted the attached Fuel Efficiency Vehicle Policy.

Thank you.

Signature and Typed Name of Superintendent of Schools



Compensation for Coaches & Activity Leaders

Joint School Committee
March 1, 2012

Process for Developing a new & improved Schedule B

- Review Positions & Requirements
 - Steve Desy, Kay Steeves
- Review peer contracts (DCL)
 - **Peter Montalbano**, Joyce Kelly, Karen Sonner, Bill Noeth
- A New proposed structure for Schedule B
 - Group positions into categories.
 - Set step size & number (negotiation).
 - Establish relative compensation (negotiation).

Jan 19th & Feb 1st AEA and NSC met to negotiate a new Schedule B.

**Feb 2nd Jt SC reviewed the proposal in Executive Session
Feb 9th AEA ratified new Schedule B**

Compensation for Coaches and Activity Leaders - New

Structure of the New Schedule B

- Ten Categories + Drama.
- Category placement based on total time commitment.
- Four steps based on experience.
- Highest Category is Head/Varsity Football Coach.

How is equity achieved in the new schedule?

- *External equity* based on comparison of category 2&3 coaches to other school districts
- *Internal equity* based on time commitment (hours)

Compensation for Coaches and Activity Leaders - Categories

Category 2

Varsity (Head) Basketball Coach

Varsity (Head) Hockey Coach Varsity (Head) Lacrosse Coach

Yearbook

Category 3

Academic Decathlon

AV Media Director

Band Director

Varsity (Head) Baseball Coach

Varsity (Head) Field Hockey Coach

Varsity (Head) Soccer Coach Varsity (Head) Softball Coach

Varsity (Head) Spring Track Coach

Varsity (Head) Volleyball Coach

Varsity (Head) Winter Track Coach

Compensation \$/Season

External Equity based on Categories 2&3

Category	Westford	CC& Weston & Wayland	Minute- man	AB 2012	<i>propose AB 2013</i>	Lynnfield	Andover
1	7301	8759	9181	8838	<i>8900</i>	12,250	8,945
2	5261	6820	6935	7365	<i>7209</i>	7497	7599
3	5261	6701	6185	5635	<i>6408</i>	7497	5343

- Category 1 Football coach
- Category 2&3 values are averages for multiple positions
- All FY13 except CC FY14

Compensation for Coaches and Activity Leaders - Issues

- Some districts provide equivalent compensation for category 2&3 coaches
 - NSC supports AEA position that requirements of category 2&3 are different
 - Average of category 2&3 provides best basis for assessing external equity (large number of positions in each school system to compare)
- Some Schedule B coaches are highly compensated
 - Grandfather these coaches (primarily category 2) & salary will not increase until Schedule B "catches up"
 - New coaches will be hired at new, lower level
- Comparison with other districts shows highly variable compensation for positions in Category 4-10
 - NSC supports AEA position that internal equity should drive the compensation level for categories 4-10. Compensation set based on relative hours
- Four steps based on experience.
 - Steps operate as in current schedule B

Negotiation – Schedule B

Same Schedule for FY10, 11 &12

New Schedule for FY13

	FY10	FY11	FY12	FY13
				\$'000s
Schedule B	\$477	\$481	\$485	\$542
AEA original				\$558
NSC				\$536
AEA/NSC				\$541

- Existing contract would increase \$4K for steps
- Proposed increase is \$57K including \$5K for new positions
- For existing positions: \$52K, 11 % over three years
- Does not increase compensation in top categories, incremental \$ improve internal equity

Future Issues

- Establish procedure for categorizing new positions, internal equity based on hours
responsibility: HR Aug 2012
- Review and improve procedures for coach and activity leader evaluation. Move from steps based on longevity to steps based on successful evaluation.
responsibility: HR/SC future contract negotiation.

Motion

Move to accept the revised Compensation for Coaches & Activity Leaders, Schedule B, with categories and compensation as provided in *Coaches and Activity Advisor Stipends, Attachment A* and to authorize the Chairman to sign the Memorandum of Agreement.

Coaches and Activity Advisor Stipends

Category	STEP 1	STEP 2	STEP 3	STEP 4
1	\$6,687	\$7,356	\$8,091	\$8,900
2	\$5,416	\$5,958	\$6,554	\$7,209
3	\$4,815	\$5,296	\$5,826	\$6,408
4	\$3,878	\$4,266	\$4,693	\$5,162
5	\$2,942	\$3,237	\$3,560	\$3,916
6	\$2,274	\$2,501	\$2,751	\$3,026
7	\$1,939	\$2,133	\$2,346	\$2,581
8	\$1,404	\$1,545	\$1,699	\$1,869
9	\$936	\$1,030	\$1,133	\$1,246
10	\$334	\$368	\$405	\$445

High School Positions**Category 1 (100%)**

Varsity (Head) Football Coach

Category 2 (81%)

Varsity (Head) Basketball Coach

Varsity (Head) Hockey Coach

Varsity (Head) Lacrosse Coach

Yearbook

Category 3 (72%)

Academic Decathlon

AV Media Director

Band Director

Varsity (Head) Baseball Coach

Varsity (Head) Field Hockey Coach

Varsity (Head) Soccer Coach

Varsity (Head) Softball Coach

Varsity (Head) Spring Track Coach

Varsity (Head) Volleyball Coach

Varsity (Head) Winter Track Coach

Category 4 (58%)

Newspaper

Varsity (Head) Gymnastics Coach

Varsity (Head) Ski Coach

Varsity (Head) Swimming Coach

Varsity (Head) Tennis Coach

Varsity (Head) Wrestling Coach

Varsity (Head) X-Country Coach

Category 5 (44%)

Student Council

Varsity (Head) Cheerleading Coach

Varsity (Head) Golf Coach

Category 6 (34%)

Envirothon

Math League

Mock Trial

Science Olympiad

Senior Class Advisor

Speech and Debate (2 positions)

Window Seat and Creative Writing

Category 7 (29%)

Jazz Band

Ambassador Program

Category 8 (21%)

ABCO

AB Human Rights

Anime Crew

Art Club

ASHA

AB Buddies

Common Ground

Funk and Soul

FBLA

High School Trivia Team

Interact Club

Invisible Children

Junior Class Advisor

National Honor Society

Outdoor Club

Peer Leadership

Recycling Group

SADD

TGIF

Youth in Philanthropy

Category 9 (14%)

English Hour

Freshman Class Advisor

Idiosyncrasy

Ocean Science Bowl

Sophomore Class Advisor

Category 10 (5%)

Student Interest Groups

The stipend for all Assistant, Junior Varsity, and Freshman team coaches will be 65% of the stipend for the coach of the respective sport

Junior High School Schedule

Category 1 (100%)

Category 2 (81%)

Category 3 (72%) AV Media/Auditorium Coordinator

Category 4 (58%) Yearbook

Category 5 (44%) Drama Club and Productions

Head Coaches

Junior High School Athletic Director

Category 6 (34%) AB Blueprint

Math Counts

Science Olympiad

Speech

Category 7 (29%) Adopt-a-Grandparent

Jazz Band

Category 8 (21%) Chorus

Ski Club

Category 9 (14%) Art Club

Games Club

Climate Club

Creative Writing

Engineering and Technology

School Store

Variety Show

Category 10 (5%) Anime Club

French Club

Spanish Club

Student Interest Groups

Systemwide Schedule

Mentor Teacher Coordinator

3653

Staff Professional Development Coordinator

3653

Mentor Teacher

800

Mentor Buddy

250

**The stipend for all Assistant Coaches will be 65%
of the stipend for the coach of the respective sport.**

JHS and SHS Drama Schedule

Position	STEP 1	STEP 2	STEP 3	STEP 4
Play Director				
Musical	2400	2600	2800	3000
Fall Play	2400	2600	2800	3000
Festival	2400	2600	2800	3000
Play Crew Chief				
Assistant Director	2150	2300	2450	2600
Music Director	2150	2300	2450	2600
Choreographer	2150	2300	2450	2600
Technical Director	2150	2300	2450	2600
Set Design/Construction	2150	2300	2450	2600
Musician	550	600	650	700
Other (Smaller) Plays				
Director	1800	2100	2300	2500
Technical Director	850	900	950	1000
Set Design/Construction	1000	1100	1200	1300

Massachusetts Educator Evaluation System Standards for Administrators

I. Instructional Leadership Standard

Promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes effective teaching and learning the central focus of schooling.

- (a) **Curriculum indicator:** Ensures that all teachers design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measurable outcomes.
- (b) **Instruction indicator:** Ensures that instructional practices in all settings reflect high expectations regarding content and quality of effort and work, engage all students, and are personalized to accommodate diverse learning styles, needs, interests, and levels of readiness.
- (c) **Analysis indicator:** Ensures that all teachers use a variety of formal and informal methods and assessments to measure student learning, growth and understanding, and also make necessary adjustments to their practice when students are not learning.
- (d) **Evaluation indicator:** Provides effective and timely supervision and evaluation in alignment with state regulations and contract provisions, including:
 - 1. Ensures educators pursue meaningful, actionable, and measurable professional practice and student learning goals.
 - 2. Makes frequent unannounced visits to classrooms and gives targeted and constructive feedback to teachers.
 - 3. Exercises sound judgment in assigning ratings for performance and impact on student learning.
 - 4. Reviews alignment between judgment about practice and data about student learning, growth, or achievement when evaluating and rating educators and understands that the supervisor has the responsibility to confirm the rating in cases where a discrepancy exists.
- (e) **Data-informed Decision-making indicator:** Uses multiple sources of evidence related to student learning, including state, district, and school assessment results and growth data, to inform school and district goals and improve organizational performance, educator effectiveness, and student learning.

II. Management and Operation standard

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

- (a) **Environment indicator:** Develops and executes effective plans, procedures, routines and operational systems to address a full range of safety, health, emotional, and social needs of students.
- (b) **Human Resource Management and Development indicator:** Implements a cohesive approach to recruitment, hiring, induction, development, and career growth that promotes high quality and effective practice.
- (c) **Scheduling and Management Information Systems indicator:** Uses systems to ensure optimal use of time for teaching, learning and collaboration.
- (d) **Laws, Ethics and Policies indicator:** Understands and complies with state and federal laws and mandates, school committee policies, collective bargaining agreements, and ethical guidelines.
- (e) **Fiscal Systems indicator:** Develops a budget that supports the district's vision, mission and goals; allocates and manages expenditures consistent with district/school level goals and available resources.

III. Family and Community Engagement Standard

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

- (a) **Engagement indicator:** Actively ensures that all families are welcome members of the classroom and school community and can contribute to the classroom, school, and community's effectiveness.
- (b) **Sharing Responsibility indicator:** Continuously collaborates with families to support student learning and development both at home and at school.
- (c) **Communication indicator:** Engages in regular, two-way, culturally proficient communication with families about student learning and performance.
- (d) **Family Concerns indicator:** Addresses family concerns in an equitable, effective and efficient manner.

IV. Professional Culture Standard

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

- (a) **Commitment to High Standards indicator:** Fosters a shared commitment to high standards of teaching and learning with high expectations for achievement for all, including:
 - 1. Mission and Core Values: Develops, promotes, and secures staff commitment to core values that guide the development of a succinct, results-oriented mission statement and ongoing decision-making.
 - 2. Meetings: Plans and leads well-run and engaging meetings that have clear purpose, focus on matters of consequence, and engage participants in a thoughtful and productive series of conversations and deliberations about important school matters.
- (b) **Cultural Proficiency indicator:** Ensures that policies and practices enable staff members and students to contribute to and interact effectively in a culturally diverse environment in which students' backgrounds, identities, strengths, and challenges are respected.
- (c) **Communication indicator:** Demonstrates strong interpersonal, written, and verbal communication skills.
- (d) **Continuous Learning indicator:** Develops and nurtures a culture in which all staff members are reflective about their practice and use student data, current research, best practices and theory to continuously adapt instruction and achieve improved results. Models these behaviors in the administrator's own practice.
- (e) **Shared Vision indicator:** Successfully and continuously engages all stakeholders in the creation of a shared educational vision in which every student is prepared to succeed in postsecondary education and careers, and can become responsible citizens and community contributors.
- (f) **Managing Conflict indicator:** Employs strategies for responding to disagreement and dissent, constructively resolving conflict, and building consensus throughout a district/school community.

Massachusetts Educator Evaluation System Standards for Teachers

I. Curriculum, Planning and Assessment Standard

Promotes the learning and growth of all students by providing high quality and coherent instruction, designing and administering authentic and meaningful student assessments, analyzing student performance and growth data, using this data to improve instruction, providing students with constructive feedback on an on-going basis, and continuously refining learning objectives.

- (a) **Curriculum and Planning indicator:** Knows the subject matter well, has a good grasp of child development and how students learn, and designs effective and rigorous standards-based units of instruction consisting of well-structured lessons with measurable outcomes.
- (b) **Assessment indicator:** Uses a variety of informal and formal methods of assessment to measure student learning, growth, and understanding, develop differentiated and enhanced learning experiences, and improve future instruction.
- (c) **Analysis indicator:** Analyzes data from assessments, draws conclusions, and shares them appropriately.

II. Teaching all Students Standard

Promotes the learning and growth of all students through instructional practices that establish high expectations, create a safe and effective classroom environment, and demonstrate cultural proficiency.

- (a) **Instruction indicator:** Uses instructional practices that reflect high expectations regarding content and quality of effort and work, engage all students, and are personalized to accommodate diverse learning styles, needs, interests, and levels of readiness.
- (b) **Learning Environment indicator:** Creates and maintains a safe and collaborative learning environment that values diversity and motivates students to take academic risks, challenge themselves, and claim ownership of their learning.
- (c) **Cultural Proficiency indicator:** Actively creates and maintains an environment in which students' diverse backgrounds, identities, strengths, and challenges are respected.
- (d) **Expectations indicator:** Plans and implements lessons that set clear and high expectations and make knowledge accessible for all students.

III. Family and Community Engagement Standard

Promotes the learning and growth of all students through effective partnerships with families, caregivers, community members, and organizations.

- (a) **Engagement indicator:** Welcomes and encourages every family to become active participants in the classroom and school community.
- (b) **Collaboration indicator:** Collaborates with families to create and implement strategies for supporting student learning and development both at home and at school.
- (c) **Communication indicator:** Engages in regular, two-way, and culturally proficient communication with families about student learning and performance.

IV. Professional Culture Standard

Promotes the learning and growth of all students through ethical, culturally proficient, skilled, and collaborative practice.

- (a) **Reflection indicator:** Demonstrates the capacity to reflect on and improve the educator's own practice, using informal means as well as meetings with teams and work groups to gather information, analyze data, examine issues, set meaningful goals, and develop new approaches in order to improve teaching and learning.
- (b) **Professional Growth indicator:** Actively pursues professional development and learning opportunities to improve quality of practice or build the expertise and experience to assume different instructional and leadership roles.
- (c) **Collaboration indicator:** Collaborates effectively with colleagues on a wide range of tasks.
- (d) **Decision-making indicator:** Becomes involved in school-wide decision-making, and takes an active role in school improvement planning.
- (e) **Shared Responsibility indicator:** Shares responsibility for the performance of all students within the school.
- (f) **Professional Responsibilities indicator:** Is ethical and reliable, and meets routine responsibilities consistently.

New Massachusetts Frameworks for Educator Evaluation

Acton Public and Acton-
Boxborough Regional
School Committees
March 1, 2012

Outcome of Negotiations Process

- The AEA teacher's contract that was voted in March 2011 included a separate follow on process to review and update the APS/AB teacher evaluation process and tools. The current contractual evaluation process was developed in the early 1990s mirroring Ed Reform.
- A task force was formed with teachers and evaluators representing all schools. The task force has been meeting regularly since March, 2011.
- In June 2011 Massachusetts passed new regulations for the evaluation of all educators (teachers and administrators). These regulations must be implemented in our district by September 2013. Extensive documents and protocols have been created and are available on the DESE website. We plan to pilot this new system in September 2012 for full implementation in September 2013.
- We will need to negotiate some temporary language for the 2012-2013 pilot and more extensive language for FY '13.
- We are recommending that you authorize the administration to negotiate these language changes and bring them back to the committee for a vote.

Task Force: Diverse group of APS/AB Educators

Evaluators

Alixé Callen, Principal ABRHS
Ed Kaufman, Principal, Merriam
David Krane, Principal McT
Lynne Laramie, K-6 SpEd Coord
Bill Noeth, Math RDL
Jennifer Vacca, JH English Dept Ldr
Todd Chicko, Counseling RDL

Teachers

Anne Littlefield, Douglas 2nd Gr Tchr
Allison O'Leary, McT SpEd Tchr
Cindy Holt, Gates 1st Gr Tchr
Diane Cileno, HS Librarian
Marc Lewis, AEA, JH Soc Stud Tchr
Gabrielle Berberian, AEA, JH Tchr
Chris Clinton, HS ScienceTchr

Marie Altieri, Director Personnel
Deborah Bookis, Director Curriculum & Assessment

APS/AB Evaluation Timeline

- **June 2011:** Present at Leadership Conference
- **September/October 2011:** Present at faculty meetings
- **2011-2012**
Each school, department, grade level, discipline, create *learning goals* to show student learning over time and tools to measure student growth
- **Jan 2012**
DESE releases model documents and protocols
- **June 2012**
Leadership Conference training and adoption of new system
- **September 2012**
Pilot new system
- **September 2013**
Fully implement new system

Task Force Consensus

- Our current system, which revolves around the traditional 45 minute formal observation is not reflective of the quality teaching and learning that happens every day throughout the year
- Our current evaluation system is not manageable for many evaluators. Seven standards, all narrative feedback.
Particularly true for elementary principals: One Evaluator: 25+ professional staff
- Not enough dialogue between teacher and evaluator
- Once every two years does not provide growth opportunities for teachers
- It is valuable to have administrators visit classrooms more often
- New Massachusetts Requirement:
Move evaluation systems from not just observations of **teacher behaviors**, but also multiple measures of **student learning**

New Massachusetts Model System for Educator Evaluation Timeline

- May 2010 - MA Taskforce established 40 members including Supts, SC, Teachers, MTA, DESE, MASPA, etc.
- August 2010 – March 2011 Meetings
- Report to MA Board of Ed March 22, 2011
- Commissioner recommendations to Board April 27, 2011
- Public Comment April 27 – June 10, 2011 *Our taskforce provided detailed feedback
- Vote on new regulations June 28, 2011
- Implementation:
 - Sept 2011: Districts with Category 4 schools and voluntary “early adopters”
 - Sept 2012: Race to the Top Districts
 - Sept 2013: All other Districts

Key Features of the Educator Evaluation Framework

Why the DESE is doing this ...

- To reinforce that effective teachers & leaders matter
- To promote leaders' and teachers' growth and development
- To place student learning at the center of the process

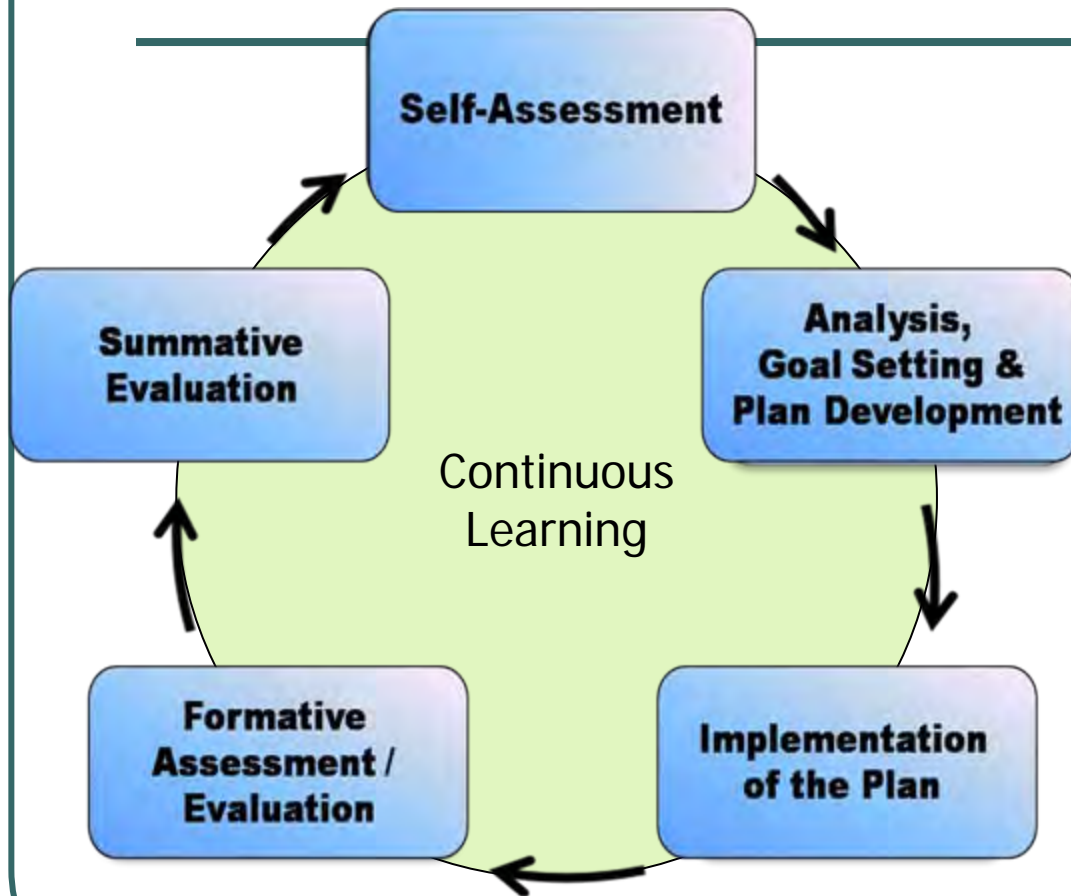
Who does this apply to ...

- All educators serving in a position that requires a license
Separate Rubrics Developed for Superintendent and Central Office Administrators; School Based Administrators (Principals, Asst. Principals; Teachers and Caseload Educators (Counselors, Nurses, Special Educators, etc.)

“Current evaluation practices in the state are wobbly, at best. We are often stuck in place, unable to move beyond simple compliance with procedures. The Task Force and the Board of Education have a chance to break this logjam. We can create a more ambitious, focused and growth-oriented framework. I am hoping for a breakthrough.”

Task Force Member, former Teacher and Principal

5 Step Evaluation Cycle



- ★ Every educator is an active participant in an evaluation
- ★ Process promotes collaboration and continuous learning

Four Standards

→ Indicators → Rubrics

<u>Administrators</u>	<u>Teachers</u>
Instructional Leadership	Curriculum, Planning & Assessment
Management & Operations	Teaching All Students
Family & Community Partnerships	Family & Community Engagement
Professional Culture	Professional Culture

Four Performance Ratings

Exemplary

Proficient

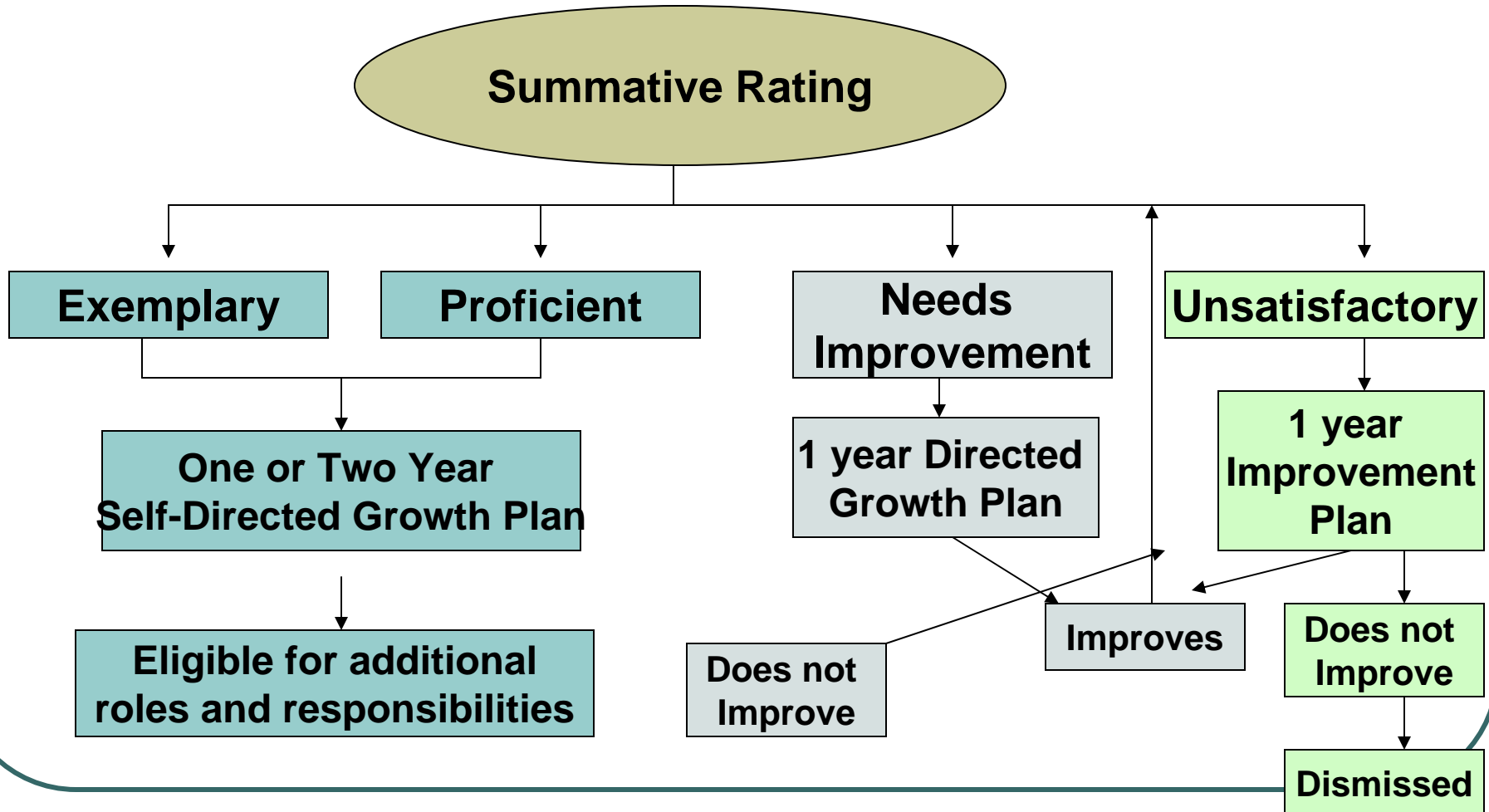
Needs Improvement

Unsatisfactory

Ratings Summary

- Summative rating
 - Rating on each of the Four Standards of Practice
 - Attainment of Goals
 - Other evidence
 - RTTT implementation in 2012/13
- Impact on Student Learning rating
 - Districts identify measures during 2012/13 and begin implementing during 2013/14
 - Two district-determined measures (MCAS where applicable)
 - ESE guidance on district-determined measures in June 2012
- Link to Ed Eval Overview on ESE website
<http://www.doe.mass.edu/eval/model/>

Decision Flow for Experienced Educators



Three Categories of Evidence

Multiple Measures of Student Learning

Judgments based on observations and artifacts of professional practice

Educator's Collection of Additional Evidence Relevant to One or More Standards

****Including feedback from staff, students and parents.***

Using *Multiple Measures* of Student Learning and Growth

- MCAS growth percentiles, when applicable
- MEPA growth scores, when applicable
- Other assessments comparable district-wide across grade or subject, including approved commercial assessments and district-developed pre/post unit and course assessments, portfolios, district determined student learning objectives, and capstone projects
- Teacher-developed assessments (individual and-or team)

Linking Student Learning and Educator Practice

Exemplary			
Proficient			
Needs Improvement			
Unsatisfactory			
Impact on Student Learning	Low	Moderate	High

Four Standards

→ Indicators → Rubrics

<u>Administrators</u>	<u>Teachers</u>
Instructional Leadership	Curriculum, Planning & Assessment
Management & Operations	Teaching All Students
Family & Community Partnerships	Family & Community Engagement
Professional Culture	Professional Culture

Curriculum, Planning and Assessment Standard

Promotes the learning and growth of all students by providing high quality and coherent instruction, designing and administering authentic and meaningful student assessments, analyzing student performance and growth data, using this data to improve instruction, providing students with constructive feedback on an on-going basis, and continuously refining learning objectives.

(a) Curriculum and Planning

(b) Assessment

(c) Analysis

Teaching all Students Standard

Promotes the learning and growth of all students through instructional practices that establish high expectations, create a safe and effective classroom environment, and demonstrate cultural proficiency.

(a) Instruction

(b) Learning Environment

(c) Cultural Proficiency

(d) Expectations

Family and Community Engagement Standard

Promotes the learning and growth of all students through effective partnerships with families, caregivers, community members, and organizations.

- (a) Engagement**
- (b) Collaboration**
- (c) Communication**

Professional Culture Standard

Promotes the learning and growth of all students through ethical, culturally proficient, skilled, and collaborative practice.

- (a) Reflection**
- (b) Professional Growth**
- (c) Collaboration**
- (d) Decision-making**
- (e) Shared Responsibility**
- (f) Professional Responsibilities**

Guide to Model Rubrics

- The power of rubrics
 - Create a shared understanding of proficient performance
 - Organize evidence
 - Inform professional judgments

Guide to Model Rubrics

- Structure and design choices
 - Regulations define Standards and Indicators
 - *Proficient* is the rigorous, expected level of performance
 - Used to understand patterns in evidence gathered across multiple points in time

Standard II: Teaching All Students. *The teacher promotes the learning . . .*

Indicator II-A. Instruction: Uses instructional practices that reflect high expect. . .				
II-A. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-A-1. Quality of Effort and Work	Establishes no or low expectations around quality of work and effort and/or . . .	States high expectations for quality and effort, but provides few exemplars and rubrics, limited guided practice, . . .	Consistently defines high expectations for the quality of student work and produce high-quality work. Is able to model this element.
II-A-2. Student Engagement	Uses instructional practices that leave most students uninvolved and/or passive . . .	Uses instructional practices that motivate and engage some students but leave others uninvolved and/or passive . . .	Consistently uses instructional practices that are likely to motivate during independent and home work. Is able to model this element.

Evaluation Schedule

- **Recent Events**

- December 2 Panel of Early Adopters (Franklin, Wachusett, Worcester)
- December 15 MTA Presentation to Task Force
- January 10 DESE Release of Model Documents - Webinar
- January 25 Wayland DESE Training of Model System
(Training specially designed for our ten communities: AB, Concord-Carlisle, Wayland, Needham, Lexington, Weston, Brookline, Sudbury, Belmont, Newton)
- Jan – May Task force meets every other week

- **Task Force Subcommittees**

- Educator Reflection and Goal Setting *Deborah Bookis*
- Rubrics for Teachers *Jennifer Vacca*
- Rubrics for Caseload Educators *Todd Chicko*
(Counselors, Nurses, Special Educators, Librarians, Art, Music, P.E.)
- Timelines: Number of Observations, Feedback, Data Collection *Chris Clinton*
- Contract Language *Gabrielle Berberian, Bill Noeth*

- **Implementation Timeline**

- Draft Temporary Contract Language May 2012
- Pilot Sept 2012 – June 2013
- Complete Contract Language Spring 2013
- Full Implementation September 2013

What do we need School Committee to do?

- Scan through documents and become familiar with new system.
- Agree to move to use the new evaluation system for the Superintendent.
- Review Superintendent documents and determine timeline, process, etc at March 22 meeting.
- Tonight: Determine Chairs' roles.
- Be prepared to approve temporary language for Teachers' pilot next year.



Massachusetts Department of
**ELEMENTARY & SECONDARY
EDUCATION**

The Massachusetts Model System for Educator Evaluation

Part VI: Implementation Guide for Superintendent Evaluation

January 2012

Massachusetts Department of Elementary and Secondary Education
75 Pleasant Street, Malden, MA 02148-4906
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www.doe.mass.edu



This document was prepared by the
Massachusetts Department of Elementary and Secondary Education
Mitchell D. Chester, Ed.D.
Commissioner

Board of Elementary and Secondary Education Members

Ms. Maura Banta, Chair, Melrose
Ms. Beverly Holmes, Vice Chair, Springfield
Dr. Vanessa Calderón-Rosado, Milton
Ms. Harneen Chernow, Jamaica Plain
Mr. Gerald Chertavian, Cambridge
Mr. Matthew Gifford, Chair, Student Advisory Council, Brookline
Dr. Jeff Howard, Reading
Ms. Ruth Kaplan, Brookline
Dr. Dana Mohler-Faria, Bridgewater
Mr. Paul Reville, Secretary of Education, Worcester
Mr. David Roach, Sutton

Mitchell D. Chester, Ed.D., Commissioner and Secretary to the Board

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Mitchell D. Chester, Ed.D.
Commissioner

A Letter from the Commissioner

Massachusetts Department of Elementary and Secondary Education

75 Pleasant Street, Malden, Massachusetts 02148-4906

Telephone: (781) 338-3000
TTY: N.E.T. Relay 1-800-439-2370

January 10, 2012

Dear Educators and other interested Stakeholders,

I am pleased to present Part I of the Massachusetts Model System for Educator Evaluation. Since late June, when the Board of Elementary and Secondary Education adopted regulations to improve student learning by overhauling educator evaluation in the Commonwealth, staff here at the Department has been working closely with stakeholders to develop the Model System called for in the regulations. With the help of thoughtful suggestions and candid feedback from a wide range of stakeholders, we developed the first six components of the Model System:

- District-Level Planning and Implementation Guide
- School-Level Planning and Implementation Guide
- Guide to Rubrics and Model Rubrics for Superintendent, Administrator and Teacher
- Model Collective Bargaining Contract Language
- Implementation Guide for Principal Evaluation
- Implementation Guide for Superintendent Evaluation

I am excited by the promise of Massachusetts' new regulations. Thoughtfully and strategically implemented, they will improve student learning by supporting analytical conversation about teaching and leading that will strengthen professional practice. At the same time, the new regulations provide the opportunity for educators to take charge of their own growth and development by setting individual and group goals related to student learning.

The Members of the State Board and I know that improvement in the quality and effectiveness of educator evaluation will happen only if the Department does the hard work ahead "with the field," not "to the field." To that end, we at the Department need to learn with the field. We will continue to revise and improve the Model System including the Implementation Guides based on what we learn with the field over the next few years. To help us do that, please do not hesitate to send your comments, questions and suggestions to us at EducatorEvaluation@doe.mass.edu. Please also visit the Educator Evaluation webpage at www.doe.mass.edu/edeval/. We will be updating the page regularly.

Please know that you can count on the Department to be an active, engaged partner in the challenging, but critical work ahead.

Sincerely,

Mitchell D. Chester, Ed.D.
Commissioner of Elementary and Secondary Education

The Massachusetts Model System for Educator Evaluation Overview

The Model System is a comprehensive educator evaluation system designed by the Department of Elementary and Secondary Education (ESE), pursuant to the new educator evaluation regulations, 603 CMR 35.00. The following eight-part series was developed to support effective implementation of the regulations by districts and schools across the Commonwealth.

Part I: District-Level Planning and Implementation Guide

This Guide takes district leaders – school committees, superintendents and union leaders - through factors to consider as they decide whether to adopt or adapt the Model System or revise their own evaluation systems to meet the new educator evaluation regulation. The Guide describes the rubrics, tools, resources and model contract language ESE has developed, and describes the system of support ESE is offering. It outlines reporting requirements, as well as the process ESE will use to review district evaluation systems for superintendents, principals, teachers and other licensed staff. Finally, the Guide identifies ways in which district leaders can support effective educator evaluation implementation in the schools.

Part II: School-Level Planning and Implementation Guide

This Guide is designed to support administrators and teachers as they implement teacher evaluations at the school level. The Guide introduces and explains the requirements of the regulation and the principles and priorities that underlie them. It offers guidance, strategies, templates and examples that will support effective implementation of each of the five components of the evaluation cycle: self-assessment; goal setting and educator plan development; plan implementation and evidence collection; formative assessment/evaluation; and summative evaluation.

Part III: Guide to Rubrics and Model Rubrics for Superintendent, Administrator, and Teacher

The Guide presents the Model Rubrics and explains their use. The Guide also outlines the process for adapting them.

Part IV: Model Collective Bargaining Contract Language

This section contains the Model Contract that is consistent with the regulation, with model language for teacher evaluation. The Guide will contain model language for administrators represented through collective bargaining by March 15, 2012.

Part V: Implementation Guide for Principal Evaluation

This section details the model process for principal evaluation and includes relevant documents and forms for recording goals, evidence and ratings. The Guide includes resources that principals and superintendents may find helpful, including a school visit protocol.

Part VI: Implementation Guide for Superintendent Evaluation

This section details the model process for superintendent evaluation and includes relevant documents and a form for recording goals, evidence and ratings. The Guide includes resources that school committees and superintendents may find helpful, including a model for effective goal setting.

Part VII: Rating Educator Impact on Student Learning Using District-Determined Measures of Student Learning (July 2012)

Part VII is scheduled for publication in July 2012. It will contain guidance for districts on identifying and using district determined measures of student learning, growth and achievement, and determining ratings of high, moderate or low for educator impact on student learning.

Part VIII: Using Staff and Student Feedback in the Evaluation Process (May 2013)

Part VIII is scheduled for publication in May 2013. It will contain direction for districts on incorporating student and staff feedback into the educator evaluation process.

Overview

The Opportunity

On June 28, 2011, the Massachusetts Board of Elementary and Secondary Education adopted new regulations to guide the evaluation of all educators serving in positions requiring a license—superintendents, principals and other administrators, and teachers.¹ The regulations are designed primarily to promote leaders' and teachers' growth and development, while placing improved student learning at the center of every educator's work.² Starting in 2012–2013, every district in the Commonwealth will be phasing in evaluation systems that are consistent with the new regulations.

To do so will require changes in culture and practice in many schools and districts because the new regulations assume that all educators will take a leading role in shaping their professional growth and development. The process calls for all educators to assess their own performance and propose challenging goals. All educators will collect evidence and present conclusions about their performance, progress on their goals, and their impact on student learning, growth, and achievement. The new regulations place high value on both collaboration and accountability. As a result, all educators—and the teams they work with—will need to be supported to do this work effectively and efficiently. This Implementation Guide aims to provide support for school committees and superintendents as they apply the regulations to the superintendent evaluation process.

Massachusetts Model System for Educator Evaluation

The regulations call for the Department of Elementary and Secondary Education (ESE) to provide models for evaluating all educators. On January 10, 2012, ESE released the first components of the comprehensive Model System for Educator Evaluation that districts may choose to adopt or adapt. Rather than adopt or adapt the model, districts may choose to revise their existing evaluation systems so that they meet the requirements of the regulations. Districts that adopt the model will confirm with ESE that they have done so. Districts that decide to adapt the model or revise their existing systems will complete a detailed questionnaire and submit their systems to ESE for review. (For more information on the review process for districts that decide to adapt the model or revise their own evaluation processes, see Part I of the Model System, District-Level Implementation Guide.) Districts participating in Race to the Top will submit their evaluation systems to ESE by September 2012. Other districts will submit theirs by September 2013. ESE will report its review findings to the district and the Board of Elementary and Secondary Education.

¹ For the full text of the regulations, see <http://www.doe.mass.edu/lawsregs/603cmr35.html>.

² The regulations establish two purposes for evaluation: Promote student learning, growth, and achievement by providing superintendents with feedback for improvement, enhanced opportunities for professional growth, and clear structures for accountability, and provide a record of facts and assessments for personnel. The evaluation process for superintendents does not supersede the employment contract of the superintendent. Section 35.05 of the regulations makes explicit that: "Nothing in these regulations shall abridge the authority of a school or district to dismiss or non-renew an educator consistent with applicable law."

The regulations call for districts to phase in components of the evaluation system as follows:

- **Phase I.** The first phase of all evaluation systems calls for summative ratings based on attainment of goals and performance against the four Standards defined in the educator evaluation regulations.
- **Phase II.** The second phase adds a rating of educator impact on student learning gains based on trends and patterns for multiple measures of student learning gains. (ESE will provide direction and guidance by June 2012.)
- **Phase III.** A third phase adds using feedback from students and (for administrators) staff. (ESE will provide direction and guidance by June 2013.)

In addition, under the regulations, “districts may develop and implement Peer Assistance and Review Programs (PAR) through the collective bargaining process” (CMR 603 35.10). ESE expects to supplement the Model with guidance on peer assistance and review systems.

Development of the Model Evaluation System for Superintendents

The Model Evaluation System for superintendents has been developed by a representative group of school committee members and superintendents selected by the executive directors of the Massachusetts Association of School Committees (MASC) and the Massachusetts Association of School Superintendents (MASS) in collaboration with staff from ESE.³ In addition, representatives from the Massachusetts Elementary Principals Association (MESPA) and Massachusetts Secondary School Administrators Association (MSSAA) offered suggestions and commented on features of the process as it was being developed. The MASC and MASS representatives met with ESE staff members throughout fall 2011 to reach consensus on a model process that is consistent with the new regulations and that all three organizations will recommend. They developed this Implementation Guide to provide school committees and superintendents with guidance on implementing the model.

This Implementation Guide describes the model and includes relevant documents including a report form on which school committees and superintendents can record goals, evidence, and ratings. The guide includes resources that school committees and superintendents may find helpful. These include resources to support effective goal setting, suggestions for how to modify the process for superintendents in their first year, and suggestions for superintendents serving in supervisory unions in which more than one school committee shares responsibility for their evaluation. Under Massachusetts Public Records and Open Meeting laws, the superintendent evaluation process is a public process. Appendix J details how these laws affect the process for evaluating the superintendent.

The regulations require that ESE update its Model System as needed in future years. ESE looks forward to receiving feedback on this Implementation Guide at educatorevaluation@doe.mass.edu.

³ For MASC: Mike Gilbert (MASC field director, former Holliston and Whittier school committees), Jim Hardy (MASC field director and former East Bridgewater), Dorothy Presser (MASC president, Lynnfield), Rebecca Stone (Brookline), and Geoff Swett (Wareham).

For MASS: Melinda Boone (Worcester), Mary Czajkowski (MASS vice president, Barnstable), Midge Frieswyk (Avon), Bill Lupini (Brookline), Chris McGrath (MASS and former Tewksbury), and Isabelina Rodriguez (Granby).

For ESE: Claudia Bach and Karla Baehr.

Resources to Support Effective Implementation

MASC, MASS, and ESE are committed to supporting school committees and superintendents to implement the Model System. All three organizations see strengthening superintendent evaluation as an opportunity for school committees and superintendents to take the lead in modeling for their staff members and stakeholders “best practice” in evaluating the district’s chief executive officer. By doing so, school committees and superintendents can lead the way in modeling the culture and practice of collaboration and accountability that are at the heart of the new regulations.

In addition to working together to produce this Implementation Guide, the three organizations are collaborating through the District Governance Project. Using Race to the Top funding, MASC, in consultation with MASS and ESE, is developing a training module and coaching support to help school committees and superintendents implement the model effectively and in ways that will help them strengthen their focus on improving student learning. In addition, MASC’s orientation workshop for new school committee members, Charting the Course, is being revised to incorporate information about using the Model Evaluation System for superintendents.⁴

⁴ For details on the District Governance Project and Charting the Course, see the MASC website (<http://www.masc.org>).

The Model Evaluation Process for Superintendents

Standards, Indicators, and Rubric

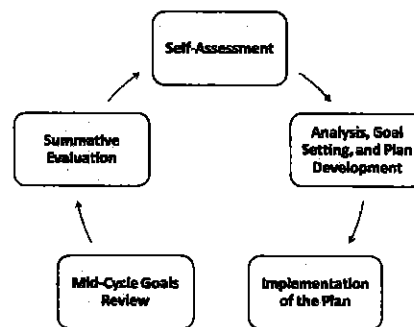
This Implementation Guide contains Standards and Indicators of effective superintendent practice that are based on the Standards and Indicators of effective administrative leadership practice detailed in the regulations.⁵ As required by the regulations, the Standards and Indicators have been turned into a rubric that specifies the elements of each indicator and then describes the elements at four levels of performance: *Unsatisfactory*, *Needs Improvement*, *Proficient*, and *Exemplary*.

A rubric is a critical component of the regulations, required for every educator. Rubrics are a tool for making explicit and specific the behaviors and actions present at each level of performance. They can foster constructive dialogue about performance expectations and how to improve practice. Used well, the rubrics prompt careful analysis, thoughtful discussion and constructive feedback. They may need to be adapted to match the job responsibilities of superintendents in large districts in which other district administrators may be directly responsible for some functions that in smaller districts are performed directly by the superintendent. These and other differences in local context can be explored in the discussion of the rubric. It should be noted that the superintendent can use the rubric as the starting point for developing expectations for assistant superintendents and other district-level administrators since many of the Indicators and elements appropriate for superintendents also are appropriate expectations for other district administrators. Collective bargaining is required in the case of evaluation of administrators not employed under individual employment contracts, as are superintendents, principals and some district administrators.

Annual Five-Step Cycle of Continuous Improvement

This Implementation Guide is organized around the five-step cycle required for all educators, a centerpiece of the new regulations designed to have all educators play a more active, engaged role in their professional growth and development.

Under the regulations, evaluation is an annual process beginning with self-assessment and concluding with summative evaluation and rating of the educator's impact on student learning. It also is a continuous improvement process in which evidence from the summative evaluation and rating of impact on learning become important sources of information for the superintendent's self-assessment and the district's subsequent goal setting.



⁵ CMR 35.05 requires districts to have a system for evaluating superintendents that "reflects the purposes" in the regulation and "adapts the Standards and Indicators for Effective Administrative Leadership and the procedures" in the regulation to the role of superintendent.

For superintendent evaluation in the Model System, the annual cycle includes the following:

- **Cycle Step 1: Superintendent's Self-Assessment.** The superintendent conducts a self-assessment using the performance Standards and rubric, data about student learning, past progress on district goals (when available), the prior year's evaluation and rating, and other relevant evidence. Based on that assessment, the superintendent identifies at least two goals to propose to the school committee: one related to improving his or her own professional practice and one related to improving student learning.
- **Cycle Step 2: Analysis, Goal Setting, and Plan Development.** During a public meeting, the school committee and superintendent review the proposed goals, key strategies, and benchmarks of progress⁶. In consultation with the superintendent and with the objective of achieving mutual agreement, the committee revises, as needed, and adopts at least one professional practice and one student learning goal.

In addition, the superintendent and school committee develop two to four district improvement goals with key strategies and benchmarks. Once adopted, the professional practice, student learning, and district improvement goals—with their key strategies and benchmarks of progress—become the Superintendent's Annual Plan. The plan serves as a basis for assessing the superintendent's performance.⁷

- **Cycle Step 3: Superintendent Plan Implementation and Collection of Evidence.** The superintendent implements the Superintendent's Plan, with assistance from the committee, as appropriate; school committee members and the superintendent individually collect evidence of progress on goals and performance against the Standards.
- **Cycle Step 4: Mid-Cycle Goals Review.** At a mid-cycle public meeting (or series of meetings), the superintendent reports on progress being made on the goals in the Superintendent's Annual Plan. The school committee reviews the report, offers feedback, and discusses progress and possible mid-cycle adjustments with the superintendent.
- **Cycle Step 5: End-of-Cycle and Summative Evaluation Reports.** The superintendent prepares an End-of-Cycle Report on progress toward each goal and performance against the Standards. In a public meeting, the school committee completes a performance review and End-of-Cycle Summative Evaluation Report assessing attainment of the goals and the superintendent's performance against the Standards (see Appendix E for step-by-step details of conducting the End-of-Cycle Summative Review).

Committees can determine when the annual cycle starts. For example, many will want the superintendent to start the self-assessment process in the summer so that Step 2 in the cycle can begin at a summer retreat or at a school committee meeting in the early fall. Others may want to be able to set district goals in the spring, so they may want Step 1 of the cycle to begin in the late winter.

⁶ Pursuant to the revised Open Meeting Law (c. 28, s. 18 2009), this component of the Superintendent evaluation and others, where noted, must take place in a public meeting. Further detail is provided in Appendix J of this Guide.

⁷ The Superintendent's Annual Plan is not the same as the District Improvement Plan described in MGL CMR 69 11. One or more of the district improvement goals that appear in the superintendent's plan also may appear in the district plan, but the superintendent's plan is not intended to include every goal the school committee has identified in its district plan. Instead, the superintendent's plan identifies the three to six goals that will carry the most weight in assessing the superintendent's performance in that year. That said, school committees and superintendents are encouraged to coordinate these two planning processes.

Goals for Student Learning, Professional Practice, and District Improvement

Within the cycle, the Implementation Guide focuses attention on establishing three kinds of goals:

- Student learning goals
- Professional practice goals
- District improvement goals

As with all educators, goal setting focuses on both improving student achievement and developing professional practice. Including district improvement goals for the superintendent helps ensure that the superintendent evaluation process is closely coordinated with the overall district improvement planning process.

Rating the Superintendent's Performance Against Standards

Under the new regulations, the performance of every educator is rated against the four performance Standards defined in the educator evaluation regulations. All educators earn one of four ratings: *Proficient*, *Exemplary*, *Needs Improvement* or *Unsatisfactory*. It is expected that most effective educators will be rated Proficient on a standard rather than Exemplary because Exemplary is reserved for educators – superintendents included – whose practice in a particular area is so strong that it can be a model for others. Each rating has a specific meaning:

- *Proficient* performance is understood to be fully satisfactory. For the superintendent, and all other administrators as well as teachers, this is the rigorous expected level of performance. It is a demanding, but attainable level of performance.
- *Exemplary* performance represents a level of performance that exceeds the already high standard of Proficient. A rating of Exemplary is reserved for performance on an indicator or standard that is of such a high level that it could serve as a model for leaders regionally or statewide. Few educators—superintendents included—are expected to earn Exemplary ratings on more than a handful of Indicators.
- A rating of *Needs Improvement* represents performance that is below the requirements of a standard but is not considered to be Unsatisfactory at the time. Improvement is necessary and expected. For new educators, performance is on track to achieve proficiency within three years.
- *Unsatisfactory* performance is merited when performance has not significantly improved following a rating of Needs Improvement, or performance is consistently below the requirements of a standard and is considered inadequate, or both.

Rating the Superintendent's Impact on Student Learning

Under the regulations, all educators will eventually earn a rating of *low*, *moderate*, or *high* for their impact on student learning based on trends and patterns of growth in at least two state and districtwide measures of student learning, including MCAS Student Growth Percentile (MCAS SGP) data. The regulations require ESE to develop and disseminate by June 2012 guidance for districts about how to select or develop appropriate districtwide measures and how to analyze them to determine an appropriate rating. When that guidance is available, ESE will publish a supplement to the Model System. In the meantime, understanding how the MCAS Student Growth Percentile (SGP) differs from the MCAS Composite Proficiency Index (CPI) is essential to ensuring fair use of student learning measures in educator evaluation.⁸

⁸ More information about SGP can be found at www.doe.mass.edu/mcas/growth.

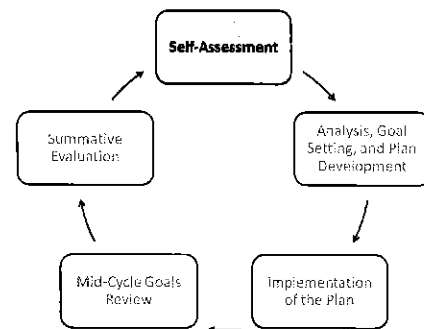
Guidance for Conducting the Evaluation Process

School committees and superintendents should seriously consider an orientation process before launching Step 1 of the five-step evaluation cycle, especially in the first years of its use.⁹ The chair and superintendent should ensure that every member receives a copy of the Implementation Guide including the End-of-Cycle Summative Evaluation Report and the rubric. All committee members and the superintendent need to have an opportunity to ask questions about the process and offer suggestions for how to make it as useful as possible for everyone involved.

Step 1 of the Cycle: Superintendent's Self-Assessment

1. The superintendent completes the self-assessment.

Using the rubric that describes the four levels of performance, the superintendent assesses his or her practice in relation to the four Standards and Indicators. The superintendent examines a wide range of evidence and consults with the district's administrative leadership team of district administrators and principals and others.



2. The superintendent identifies professional practice and student learning goals.¹⁰

The superintendent uses the self-assessment to identify goals to propose to the school committee. At least one of the goals is related to improving student learning, and one is related to improving the superintendent's own professional practice. For each goal, the superintendent identifies key actions, timelines, and benchmarks that will be used to assess progress in achieving the goals.

3. The superintendent drafts two to four district improvement goals.

In consultation with others, the superintendent drafts two to four district improvement goals with key actions, timelines, and benchmarks that can be used to assess progress in achieving the goals. To help ensure effective collaboration, it is recommended that the superintendent seek out committee perceptions of district needs and priorities in advance of drafting district improvement goals.

4. The superintendent combines the goals into a draft Superintendent's Annual Plan to propose to the school committee.

⁹ For a summary of superintendent and school committee responsibilities in the superintendent evaluation process, see Appendix C for school committees and Appendix D for superintendents.

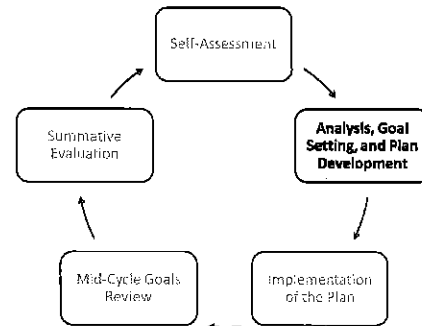
¹⁰ Appendix F, "What Makes a Goal 'SMART'?", provides information on setting specific, measurable, and actionable goals.

Step 2 of the Cycle: Analysis, Goal Setting, and Superintendent Plan Development Meeting

Each of the following steps takes place at a public meeting.

1. The superintendent and school committee review the rubric.

The superintendent and school committee review the rubric that describes the Standards and Indicators for effective superintendent practice at four levels of performance. The purpose of this joint review is to help the superintendent and school committee members clarify roles, responsibilities, and expectations.¹¹



The focus of the rubric review is on the elements within each indicator. In collaboration with the superintendent, the committee asks and answers the following questions:

- Are any revisions to the elements necessary to reflect the local district context?
- Are there any elements for which *Proficient* performance will depend on factors beyond the control of the superintendent? If so, how will those dependencies be accounted for in the evaluation process?
- Are there any standards, indicators, or elements that will be weighted more heavily than others by the committee in rating the superintendent's performance at the end of the year?

To ensure that the consensus reached during the rubric review is taken into account during the end-of-cycle performance review, the chair or superintendent should make appropriate annotations on the End-of-Cycle Summative Evaluation Report to reflect the decisions made.

2. The superintendent presents the proposed superintendent's plan to the school committee.

The superintendent meets with the school committee to present:

- Proposed professional practice and student learning goals
- Proposed district improvement goals
- Key actions, timelines, and benchmarks the superintendent proposes be gathered for the evaluation process

¹¹ Some committees may prefer to conduct the review of the rubric during a planning and orientation meeting.

3. The school committee decides on the Superintendent's Annual Plan.

Following discussion of the superintendent's proposed goals the school committee determines the professional practice and student learning goals and the evidence that will be used to complete the evaluation process and determine the superintendent's performance ratings on each standard and overall, as well as the rating of the superintendent's overall impact on student learning gains: *low*, *moderate*, or *high*.¹²

In addition, the school committee and superintendent discuss what district improvement goals will focus district work in the year ahead. The school committee adopts district improvement goals with key strategies, timelines, and benchmarks for assessing progress.

Once adopted, the district improvement, student learning, and professional practice goals—and their associated key strategies, timelines, and benchmarks of progress—become the Superintendent's Annual Plan.

The process of developing the Superintendent's Annual Plan is designed to ensure that the superintendent and school committee can achieve clarity on priorities for action. If attainment of some goals is considered more important than others, this is the time to make those expectations clear. Similarly, if performance on certain Standards and/or Indicators is considered significantly more important than others, this is also the time for committee members to offer feedback and make those expectations clear. The chair or superintendent should annotate the End-of-Cycle Summative Evaluation Report to reflect these priorities.

A note on establishing priorities among Standards: The regulations place a priority on Standard I, Instructional Leadership, for all administrators. No administrator can earn an overall rating of Proficient unless he or she has earned a rating of Proficient on Standard I.

A note on multiyear goals: School committees and superintendents often see benefit in pursuing multiyear goals. It is possible to establish multiyear goals in this annual process. As long as a multiyear goal has measurable annual benchmarks, it can be included in the Superintendent's Annual Plan.

¹² The regulations require that by June 2012, ESE will issue guidance for districts for determining the districtwide measures that are to be used in rating each educator's impact on student learning as well as guidance on determining whether the impact is *low*, *moderate*, or *high*. When that guidance is issued, ESE will update this Implementation Guide to apply that guidance to the evaluation of superintendents.

Step 3 of the Cycle: Plan Implementation and Collection of Evidence

1. The superintendent implements the plan.

The superintendent, in collaboration with the school committee, implements the plan.

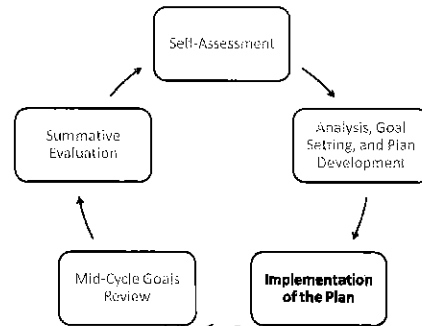
2. The superintendent and school committee members individually collect evidence.

Superintendent. The superintendent collects evidence described in the plan and other relevant evidence from three categories: (1) observations and artifacts of practice; (2) multiple measures of student learning, achievement, and growth; and (3) other relevant data, including (starting in 2013–14) student and staff survey data.¹³

School committee. The school committee reviews evidence described in the plan and other relevant evidence at a public meeting.

Examples of the evidence that may be most useful for superintendents and/or committee members to collect are included in the End-of-Cycle Summative Evaluation Report in Appendix B. For example, evidence may include:

- Mid-cycle and end-of-cycle reports on progress made on the goals
- School committee agendas, materials, and minutes
- Observations of the superintendent “in action” at school committee meetings, in forums with faculty, and in community events
- Budget presentations and reports
- Samples of newsletters, local media presentations, and other community awareness and outreach efforts
- District and school improvement plans
- Staffing and enrollment analyses
- External reviews and audits
- Superintendent’s analysis of educator practice and student learning goals
- Samples of leadership team agendas the superintendent selects
- Reports about student and staff performance

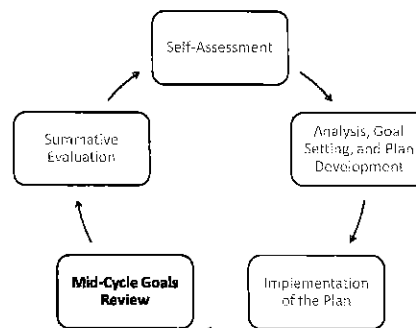


¹³ As noted in an earlier footnote, student and staff feedback are not required to be used as part of the educator evaluation process until 2013–14; ESE will provide guidance and direction by June 2013.

Step 4 of the Cycle: Mid-Cycle Goals Review Meeting

1. The superintendent prepares a progress report.

At mid-cycle, the superintendent synthesizes information obtained to date and prepares an assessment of progress on each of the goals detailed in the Superintendent's Annual Plan to present to the school committee for review. To enhance public understanding of the evaluation process, the superintendent typically presents the progress report on goals as an agenda item at a regularly scheduled meeting of the school committee.



2. The school committee and superintendent review the progress report at a public meeting:

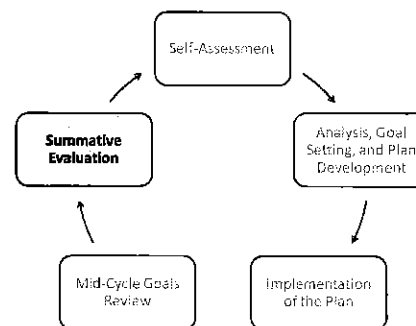
The superintendent and school committee review and discuss the report and evidence. Their purpose is to share relevant feedback, develop a clear understanding of the progress being made on each goal, and achieve agreement on what, if any, mid-course adjustments may be needed. To enhance public understanding of the evaluation process, it is recommended that the committee review the report and evidence at the same meeting at which the superintendent presents the report or at a subsequent regularly scheduled meeting of the school committee.

Step 5 of the Cycle: End-of-Cycle and Summative Evaluation and Report¹⁴

1. The superintendent submits an End-of-Cycle Progress Report.

The superintendent prepares and submits to the school committee an assessment of:

- Progress on the goals
- Performance on each of the Standards
- Impact on student learning with data supporting the assessment



¹⁴ Appendix E offers a detailed step-by-step guide to conducting the end-of-cycle performance review.

2. Each school committee member prepares an End-of-Cycle Summative Evaluation Report.

Each committee member reviews the evidence and report prepared by the superintendent as well as any other relevant evidence for the purpose of arriving at:

- An assessment of progress on goals
- A rating of the superintendent's performance on each of the Standards
- An overall rating of the superintendent's performance
- A rating of the superintendent's impact on student learning gains¹⁵

3. The school committee chair drafts an End-of-Cycle Summative Evaluation Report.

The school committee chair compiles the End-of-Cycle Evaluation Reports compiled by each member of the school committee and prepares a single summative evaluation based on the preponderance of individual ratings.

4. The school committee adopts a final End-of-Cycle Summative Evaluation Report.

At a regular or special meeting of the school committee, the superintendent and school committee discuss the report. The school committee adopts an End-of-Cycle Summative Evaluation Report.

A Note on using the End-of-Cycle Summative Evaluation Report form:¹⁶

The End-of-Cycle Summative Evaluation Report form is used at six points in the evaluation cycle:

- The superintendent and/or chair record the goals established in the Superintendent's Annual Plan and match each to one of the four Standards of performance.
- The superintendent and/or chair annotate the End-of-Cycle Summative Evaluation Report to reflect goals, Standards and/or Indicators which may be considered priorities by the School Committee.
- Individual committee members use it to complete their individual End-of-Cycle Summative Evaluation Reports.
- The school committee chair uses it to draft a composite End-of-Cycle Summative Evaluation Report
- The school committee chair or designee record the End-of-Cycle Summative Evaluation Report adopted by the school committee.
- In addition, the superintendent may use the report to record key components of his or her End-of-Cycle Progress Report.

¹⁵ As noted in the Overview, a rating of *low*, *moderate*, or *high* will be based on trends and patterns in student learning gains based on districtwide measures of student learning. ESE will be providing guidance by June 2012 about how to complete this part of the evaluation rating.

¹⁶ The End-of-Cycle Report Form appears as Appendix B

Cycle of Continuous Improvement

The five-step evaluation cycle is a continuous improvement process. The end of the annual cycle is the start of the next annual cycle. The End-of-Cycle Summative Evaluation Report that the superintendent prepares for Step 5 is the core of the self-assessment required for Step 1. Together with the school committee's End-of-Cycle Summative Evaluation Report and the discussion that led to its adoption, the superintendent has critical feedback needed to begin to consider the goals he or she will propose to the school committee for Step 2 of the evaluation process. Of course, it is not all of the information the superintendent will want to consider. For example, reviewing evidence about progress on school and district goals with district administrators, principals, teachers and others will yield essential information. So, too, will thoughtful reflection of his or her own performance against key Indicators in the rubric. That said, a carefully prepared End-of-Cycle Progress Report and thoughtful development of the school committee's End-of-Cycle Summative Evaluation Report are keys to ensuring that the dream of continuous improvement becomes a reality.



Massachusetts Department of
**ELEMENTARY & SECONDARY
EDUCATION**

Appendices: Resources to Support Effective Implementation

1

Appendix A. Standards and Indicators of Effective Superintendent Leadership Rubric

Part III: Guide to Rubrics and Model Rubrics for Superintendent, Principal and Teacher <http://www.doe.mass.edu/edeval/model/>

Appendix B. End-of-Cycle Summative Evaluation Report: Superintendent

End-of-Cycle Summative Evaluation Report: Superintendent



Superintendent: _____

Evaluator: _____

Date

Signature

Name

Step 1: Assess Progress Toward Goals (Complete page 3 first; circle one for each set of goal[s].)

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

Step 2: Assess Performance on Standards (Complete pages 4–7 first; then check one box for each standard.)

Indicators

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

Needs Improvement/Developing = Performance on a standard or overall is below the requirements of a standard or overall but is not considered to be Unsatisfactory at the time. Improvement is necessary and expected. For new superintendents, performance is on track to achieve proficiency within three years.

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

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

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
Standard I: Instructional Leadership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard II: Management and Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard III: Family and Community Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard IV: Professional Culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



End-of-Cycle Summative Evaluation Report: Superintendent

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

Unsatisfactory Needs Improvement Proficient Exemplary

Step 4: Rate Impact on Student Learning (Check only one.)

Low <input type="checkbox"/>	Moderate <input type="checkbox"/>	High <input type="checkbox"/>
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Step 5: Add Evaluator Comments

Comments and analysis are recommended for any rating but are required for an overall summative rating of Exemplary, Needs Improvement or Unsatisfactory or Impact on Student Learning rating of high or low.

Comments:

Superintendent's Performance Goals



Goals should be SMART and include at least one goal for each category: professional practice, student learning, and district improvement.
Check one box for each goal.

Goal(s)	Description	Did Not Meet	Some Progress	Significant Progress	Met	Exceeded
Professional Practice						
1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Learning						
2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
District Improvement						
3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Goals (if any)						
6		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Superintendent's Performance Rating for Standard I: Instructional Leadership

Check one box for each indicator and circle the overall standard rating.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-A. Curriculum: Ensures that all instructional staff design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measureable outcomes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I-B. Instruction: Ensures that practices in all settings reflect high expectations regarding content and quality of effort and work, engage all students, and are personalized to accommodate diverse learning styles, needs, interests, and levels of readiness.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I-C. Assessment: Ensures that all principals and administrators facilitate practices that propel personnel to use a variety of formal and informal methods and assessments to measure student learning, growth, and understanding and make necessary adjustments to their practice when students are not learning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I-D. Evaluation: Ensures effective and timely supervision and evaluation of all staff in alignment with state regulations and contract provisions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I-E. Data-Informed Decision Making: Uses multiple sources of evidence related to student learning—including state, district, and school assessment results and growth data—to inform school and district goals and improve organizational performance, educator effectiveness, and student learning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall Rating for Standard I
(Circle one.)

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

Unsatisfactory

Needs Improvement

Proficient

Exemplary

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

Examples of evidence superintendent might provide:

- ☐ Goals progress report
- ☐ Analysis of classroom walk-through data
- ☐ Analysis of district assessment data
- ☐ Sample of district and school improvement plans and progress reports

- ☐ Analysis of staff evaluation data
- ☐ Report on educator practice and student learning goals
- ☐ Student achievement data
- ☐ Analysis of student feedback
- ☐ Analysis of staff feedback

- ☐ Relevant school committee meeting agendas/materials
- ☐ Analysis of leadership team(s) agendas and/or feedback
- ☐ Protocol for school visits
- ☐ Other: _____



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

		Unsatisfactory	Needs Improvement	Proficient	Exemplary
<i>Check one box for each indicator and circle the overall standard rating.</i>					
II-A. Environment:	Develops and executes effective plans, procedures, routines, and operational systems to address a full range of safety, health, emotional, and social needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
II-B. Human Resources Management and Development:	Implements a cohesive approach to recruiting, hiring, induction, development, and career growth that promotes high-quality and effective practice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
II-C. Scheduling and Management Information Systems:	Uses systems to ensure optimal use of data and time for teaching, learning, and collaboration, minimizing disruptions and distractions for school-level staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
II-D. Law, Ethics, and Policies:	Understands and complies with state and federal laws and mandates, school committee policies, collective bargaining agreements, and ethical guidelines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
II-E. Fiscal Systems:	Develops a budget that supports the district's vision, mission, and goals; allocates and manages expenditures consistent with district- and school-level goals and available resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall Rating for Standard II <i>(Circle one.)</i>	The education leader promotes the learning and growth of all students and the success of all staff by ensuring a safe, efficient, and effective learning environment, using resources to implement appropriate curriculum, staffing, and scheduling.
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Unsatisfactory Needs Improvement Proficient Exemplary

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

Examples of evidence superintendent might provide:

- | | | |
|---|---|--|
| <input type="checkbox"/> Goals progress report
<input type="checkbox"/> Budget analyses and monitoring reports
<input type="checkbox"/> Budget presentations and related materials
<input type="checkbox"/> External reviews and audits
<input type="checkbox"/> Staff attendance, hiring, retention, and other HR data | <input type="checkbox"/> Analysis of student feedback
<input type="checkbox"/> Analysis of staff feedback
<input type="checkbox"/> Analysis of safety and crisis plan elements and/or incidence reports | <input type="checkbox"/> Relevant school committee meeting agendas/minutes/materials
<input type="checkbox"/> Analysis and/or samples of leadership team(s) schedule/agendas/materials
<input type="checkbox"/> Other: _____ |
|---|---|--|



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

Check one box for each indicator and circle the overall standard rating.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
III-A. Engagement: Actively ensures that all families are welcome members of the classroom and school community and can contribute to the effectiveness of the classroom, school, district, and community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
III-B. Sharing Responsibility: Continuously collaborates with families and community stakeholders to support student learning and development at home, school, and in the community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
III-C. Communication: Engages in regular, two-way, culturally proficient communication with families and community stakeholders about student learning and performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
III-D. Family Concerns: Addresses family and community concerns in an equitable, effective, and efficient manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall Rating for Standard III
(Circle one.)

The education leader promotes the learning and growth of all students and the success of all staff through effective partnerships with families, community organizations, and other stakeholders that support the mission of the district and its schools.

Unsatisfactory

Needs Improvement

Proficient

Exemplary

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

Examples of evidence superintendent might provide:

- ☐ Goals progress report
- ☐ Participation rates and other data about school and district family engagement activities
- ☐ Evidence of community support and/or engagement

- ☐ Sample district and school newsletters and/or other communications
- ☐ Analysis of school improvement goals/reports
- ☐ Community organization membership/participation/contributions

- ☐ Analysis of survey results from parent and/or community stakeholders
- ☐ Relevant school committee presentations and minutes
- ☐ Other: _____



Superintendent's Performance Rating for Standard IV: Professional Culture

Check one box for each indicator and circle the overall standard rating.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-A. Commitment to High Standards: Fosters a shared commitment to high standards of service, teaching, and learning with high expectations for achievement for all.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-B. Cultural Proficiency: Ensures that policies and practices enable staff members and students to interact effectively in a culturally diverse environment in which students' backgrounds, identities, strengths, and challenges are respected.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-C. Communication: Demonstrates strong interpersonal, written, and verbal communication skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-D. Continuous Learning: Develops and nurtures a culture in which staff members are reflective about their practice and use student data, current research, best practices, and theory to continuously adapt practice and achieve improved results. Models these behaviors in his or her own practice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-E. Shared Vision: Successfully and continuously engages all stakeholders in the creation of a shared educational vision in which every student is prepared to succeed in postsecondary education and become a responsible citizen and global contributor.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV-F. Managing Conflict: Employs strategies for responding to disagreement and dissent, constructively resolving conflict and building consensus throughout a district or school community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall Rating for Standard IV (Circle one.)

The education leader promotes the learning and growth of all students and the success of all staff by nurturing and sustaining a districtwide culture of reflective practice, high expectations, and continuous learning for staff.

Unsatisfactory

Needs Improvement

Proficient

Exemplary

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

Examples of evidence superintendent might provide:

- ☐ Goals progress report
- ☐ District and school improvement plans and reports
- ☐ Staff attendance and other data
- ☐ Memos/newsletters to staff and other stakeholders

- ☐ School visit protocol and sample follow-up reports
- ☐ Presentations/materials for community/parent meetings
- ☐ Analysis of staff feedback
- ☐ Samples of principal/administrator practice goals

- ☐ School committee meeting agendas/materials
- ☐ Sample of leadership team(s) agendas and materials
- ☐ Analysis of staff feedback
- ☐ Other: _____

Appendix C. School Committee Responsibilities

1. Know and understand the rubric that describes the Standards and Indicators of Effective Superintendent Leadership.
2. Participate in on-line or in-person training to strengthen capacity to implement the Massachusetts Model System for Superintendent Evaluation effectively and with integrity.¹
3. **School committee chair.** Oversee the superintendent evaluation process and ensure that all steps in the process are conducted effectively and with integrity.
4. Identify the superintendent's strengths and areas for improvement and make recommendations for improvement.
5. Ensure that the goals and actions detailed in the Superintendent's Annual Plan are:
 - a. Challenging
 - b. Measurable
 - c. Focused on high-priority needs of the district's students
6. **School committee chair.** Lead the mid-cycle goals review meeting and end-of-cycle summative evaluation meeting.
7. Ensure that the End-of-Cycle Summative Evaluation Report contains accurate information and appropriately reflects the superintendent's individual performance.

¹ The Attorney General has recently issued guidance in the form of frequently asked questions concerning the procedure to conduct superintendent evaluations pursuant to the revised Open Meeting Law (c. 28, s. 18 2009). The Attorney General's guidance is included elsewhere in this guide.

Appendix D. Superintendent Responsibilities

1. Know and understand the rubric that describes the Standards and Indicators of Effective Superintendent Leadership.
2. Participate in on-line or in-person training to strengthen capacity to implement the Massachusetts Model System for Superintendent Evaluation effectively and with integrity.
3. Prepare for the goal setting and plan development meeting with the school committee:
 - a. Complete a self-assessment of practice using the rubric.
 - b. Analyze data on student learning, growth, and achievement.
 - c. Analyze student and staff data, where available.¹
 - d. Assess district and school progress, strengths, and areas in need of improvement.
 - e. Seek input from the administrative team and others, as appropriate.
 - f. Draft three to six goals ("SMART"),² each with key strategies, timelines, and benchmarks of progress:
 - At least one goal to improve student learning
 - At least one goal to improve his or her own professional practice
 - Goals for district improvement
4. Meet with the school committee to discuss the professional practice and student learning goals you are proposing. Collaborate with the school committee to identify district improvement goals. Accept revisions determined by the school committee.
5. Implement the plan's goals, and gather data, artifacts, and other evidence that demonstrates performance in relation to the Standards, progress in attaining the goals, and impact on student learning.
6. Prepare a mid-cycle report on progress on the goals and present it to the school committee.
7. Prepare an end-of-cycle report on progress on the goals and performance on the Standards.
8. Participate actively in the end-of-cycle evaluation meeting.

¹ Student and staff feedback is not required to be used as part of the educator evaluation process until 2013–14; ESE will provide guidance and direction by July 2013. While student and staff feedback will be required, the Board has not yet determined whether parent feedback will be. Before July 2013, ESE is required to report on its research concerning "the feasibility and possible methods for districts to collect and analyze parent feedback as part of educator evaluation." See 603 CMR 35.07(1)(c)(1-2-4).

² See Appendix F, "What Makes a Goal "SMART"?"

Appendix E. Step-by-Step—Conducting the End-of-Cycle Summative Evaluation

Step 1: Individual members assess goal attainment. First, each committee member reviews the superintendent's End-of-Cycle Progress Report and other relevant evidence to make an individual determination of the progress the superintendent has made on the goals detailed in the plan. Progress toward each goal is described as:

- Did Not Meet
- Some Progress
- Significant Progress
- Met
- Exceeded

Step 2: Individual members rate performance against the Standards. Next, each member renders a judgment about the superintendent's performance against each Standard, rating it:

- Unsatisfactory
- Needs Improvement
- Proficient
- Exemplary

To reach a judgment on each standard, the committee member assesses performance against each indicator, taking into account, at a minimum, the progress on the goals most directly related to each standard. A rating of *Proficient* represents fully satisfactory performance. A rating of *Exemplary* is reserved for performance that exceeds *Proficient* and represents a regional or state model. For new superintendents, a rating of *Needs Improvement* should be seen as developing, reflecting the judgment that the new superintendent's performance on this indicator or standard is on track to becoming *Proficient* within three years.

A primary purpose of the five-step evaluation cycle is continuous improvement. Thoughtful feedback is important for continuous improvement. Committee members should support their ratings with written comments, citing the evidence they found most compelling as they decided on ratings. Although written comments are encouraged for all ratings, they are essential when ratings point to *Exemplary* or less-than-*Proficient* performance.

Step 3: Individual members rate overall performance. Third, each member renders a single overall summative judgment of the superintendent's performance based on performance against each of the four Standards and attainment of the goals detailed in the Superintendent's Annual Plan. As with each standard, the overall rating is one of four: *Unsatisfactory*, *Needs Improvement*, *Proficient*, or *Exemplary*. Again, the high standard for a rating of *Proficient* and the even higher standard for a rating of *Exemplary* prevail. As in Step 2, ratings of *Exemplary*, *Unsatisfactory* or *Needs Improvement* should be accompanied by written comments explaining the rationale and evidence for the rating.

Step 4: Individual members rate impact on student learning. Finally, based on trends and patterns on district-determined measures of student learning, MCAS Student Growth Percentile, and Massachusetts English Proficiency Assessment (MEPA) gain scores (when available), each member renders an individual judgment of the superintendent's impact on student learning.

Step 5: The chair compiles individual ratings and drafts summative evaluation. The chair, or designee, compiles the individual ratings and drafts the End-of-Cycle Summative Evaluation Report to present to the superintendent and school committee in advance of a public meeting. When compiling individual members' evaluation reports, the chair is encouraged to consider discounting individual End-of-Cycle Summative Evaluation Reports that rate the superintendent's performance as *Unsatisfactory*, *Needs Improvement* or *Exemplary* without written comments that explain the rating. Please note that both the individual and committee evaluations are public documents under Massachusetts law.¹

Step 6: Committee discusses and adopts End-of-Cycle Summative Evaluation Report. At a public meeting of the school committee at which the superintendent is present, committee members review the draft, discuss proposed revisions, and adopt a final End-of-Cycle Summative Evaluation Report that is subsequently placed in the superintendent's personnel file.

¹ See Appendix J, "How Do the Open Meeting and Public Records Laws Affect the Superintendent Evaluation Process?"

Appendix F. What Makes a Goal “SMART”?¹

Good goals help educators, schools, and districts improve. That is why the educator evaluation regulations require educators to develop goals that are specific, actionable, and measurable. They require, too, that goals be accompanied by action plans with benchmarks to assess progress.

This “SMART” Goal framework is a useful tool that individuals and teams can use to craft effective goals and action plans:

S	=	S pecific and S trategic
M	=	M easurable
A	=	A ction Oriented
R	=	R igorous, R ealistic, and R esults-Focused (the 3 Rs)
T	=	T imed and T racked

Goals with an action plan and benchmarks that have these characteristics are “SMART.”

A practical example some of us have experienced in our personal lives can make clear how this SMART goal framework can help turn hopes into actions that have results.

First, an example of *not* being “SMART” with goals: *I will lose weight and get in condition.*

Getting SMARTer: *Between March 15 and Memorial Day, I will lose 10 pounds and be able to run 1 mile nonstop.*

The **hope** is now a **goal**, that meets most of the SMART Framework criteria:

It's S pecific and S trategic	= 10 pounds, 1 mile
It's M easurable	= pounds, miles
It's A ction-oriented	= lose, run
It's got the 3 Rs	= weight loss and running distance
It's T imed	= 10 weeks

SMART enough: To make the goal really “SMART,” though, we need to add an action plan and benchmarks. They make sure the goal meets that final criteria, “Tracked.” They also strengthen the other criteria, especially when the benchmarks include “process” benchmarks for tracking progress on the key actions and “outcome” benchmarks that track early evidence of change and/or progress toward the ultimate goal.

Key Actions

- Reduce my daily calorie intake to fewer than 1,200 calories for each of 10 weeks.
- Walk 15 minutes per day; increase my time by 5 minutes per week for the next 4 weeks.

¹ The SMART goal concept was introduced by G.T. Doran, A. Miller and J. Cunningham in *There's a S.M.A.R.T. way to write management's goals and objectives*, *Management Review* 70 (11), AMA Forum, pp. 35-36. *What Makes a Goal “SMART”?* also draws from the work of Ed Costa, Superintendent of Schools in Lenox; John D'Auria, Teachers 21; and Mike Gilbert, Northeast Field Director for MASC.

- Starting in week 5, run and walk in intervals for 30 minutes, increasing the proportion of time spent running instead of walking until I can run a mile, non-stop, by the end of week 10.

Benchmarks:

- For Process, maintaining a daily record of calorie intake and exercise
- For Outcome, biweekly weight loss and running distance targets (e.g., After 2 wks: 2 lbs/0 miles; 4 wks: 4 lbs/0 miles; 6 wks: 6lbs/.2 mi; 8 wks: 8 lbs/.4 miles)

The remainder of this appendix offers more details on the characteristics of SMART goals with action plans and benchmarks as they apply in schools and districts.

S = Specific and Strategic

Goals need to be straightforward and clearly written, with sufficient specificity to determine whether or not they have been achieved. A goal is strategic when it serves an important purpose of the school or district as a whole and addresses something that is likely to have a big impact on our overall vision.

M = Measurable

If we can't measure it, we can't manage it. What measures of quantity, quality, and/or impact will we use to determine that we've achieved the goal? And how will we measure progress along the way? Progress toward achieving the goal is typically measured through "benchmarks." Some benchmarks focus on the process: are we doing what we said we were going to do? Other benchmarks focus on the outcome: are we seeing early signs of progress toward the results?

A = Action Oriented

Goals have active, not passive verbs. And the action steps attached to them tell us "who" is doing "what." Without clarity about what we're actually going to do to achieve the goal, a goal is only a hope with little chance of being achieved. Making clear the key actions required to achieve a goal helps everyone see how their part of the work is connected—to other parts of the work and to a larger purpose. Knowing that helps people stay focused and energized, rather than fragmented and uncertain.

R = Rigorous, Realistic, and Results-Focused (the 3 Rs)

A goal is not an activity: a goal makes clear what will be different as a result of achieving the goal. A goal needs to describe a realistic, yet ambitious result. It needs to stretch the educator, team, school, or district toward improvement but not be out of reach. The focus and effort required to achieve a rigorous but realistic goal should be challenging but not exhausting. Goals set too high will discourage us, whereas goals set too low will leave us feeling "empty" when it is accomplished and won't serve our students well.

T = Timed

A goal needs to have a deadline. Deadlines help all of us take action. For a goal to be accomplished, definite times need to be established when key actions will be completed and benchmarks achieved. Tracking the progress we're making on our action steps (process benchmarks) is essential: if we fall behind on doing something we said we were going to do, we'll need to accelerate the pace on something else. But tracking progress on process outcomes isn't enough. Our outcome benchmarks help us know whether we're on track to achieve our goal and/or whether we've reached our goal. Benchmarks give us a way to see our progress and celebrate it. They also give us information we need to make mid-course corrections.

Appendix G. Sample District and Superintendent SMART Goals²²

Please note that these goals are not yet “SMART” because they do not have key actions and benchmarks attached to them that will make clear how they will be accomplished and measured.

District Improvement Goals

Goal 1: Professional Learning Communities. By June 2014, at least half of our teachers will be working in a professional learning community that is supporting them to improve their practice.

Goal 2: Fair Teacher Evaluation. By June 2013, 100 percent of administrators, instructional coaches, and selected teacher leaders will be able to describe and rate teaching practice they observe consistently.

Goal 3: Curriculum Frameworks Alignment. Starting in September 2013, every student will be taught curriculum that is fully aligned with the revised MA Curriculum Frameworks for English language arts (ELA).

Goal 4: College & Career Readiness. By June 2013, increase the percentage of students who graduate having completed the MassCORE graduation requirements by five percent.

Goal 5: Goal Setting. By December 1, 2012, all principals and department heads will be pursuing a challenging yet realistic team goal to improve their professional practice.

Student Learning

Goal 1: Achievement Gap. By September 2013, our achievement gap in mathematics will be reduced by ___ percent, consistent with our district’s Race to the Top (RTTT) goal.

Goal 2: College Readiness. By June 2013, the percentage of students taking advanced placement tests will grow by at least ___ percent, and the percentage earning scores of 3 or higher on advanced placement tests will increase by ___ percent.

Goal 3: Student Growth. The median MCAS Student Growth Percentile (SGP) score for mathematics will increase by ___ percent in at least four of six grade levels.

²² See Appendix H for examples of SMART goals for superintendents new to districts.

Educator's Professional Practice

Goal 1: Meeting Leadership. I will develop more effective ways to address basic administrative tasks so that leadership team meetings can focus more on instructional improvement—75% of my leadership team meetings will have an academic focus lasting at least 45 minutes that engages members of the team in a discussion and/or activity that results in improved understanding of high-quality supervision and evaluation.

Goal 2: School Visits. I will manage my time more effectively in order to increase the frequency and quality of school visits from one one-hour visit per week, on average, to two two-hour visits per week.

Goal 3: Assessing Teaching Practice. I will improve my skills at debriefing classroom observations done jointly with principals by including a district specialist in mathematics, English as a second language, and/or science in at least one quarter of my classroom observations and follow-up debriefs with principals.

Appendix H. What Changes in the Process and Timelines Should Be Considered for New Superintendents?

The evaluation process for superintendents who are new to the district or who have been promoted from within need not be substantially different from the process used for superintendents who have served more than one year in the district. Two modifications to the process are worth considering.

The first difference lies in the rating system as it applies to superintendents new to the role of superintendent. As described earlier, ratings of *Exemplary* performance will not be commonplace. They are reserved for performance on Standards or Indicators that exceed *Proficient* and are worthy of serving as a model for others. *Proficient* performance represents performance that is fully satisfactory. It, too, is meant to represent a high standard. Few new educators—be they superintendents, principals, or teachers—are expected to be *Proficient* on every indicator or even every standard in their first years of practice. For that reason, the *Needs Improvement* level of performance has a particular meaning for educators new to the role of teacher, principal, or superintendent. In these cases, *Needs Improvement* has the meaning of developing. It means that the educator's practice on a standard or indicator is not yet *Proficient*, but the educator appears to be "on track" to achieve proficiency within three years.

The second modification applies to both superintendents new to the role and those who are new to a district. It has to do with the substance of the goals established for the superintendent in the first year.

Most new superintendents in Massachusetts will be participating in the three-year New Superintendent Induction Program launched in 2010 by ESE and MASS in collaboration with MASC. The induction program supports superintendents to be effective instructional leaders, build strong relationships with their school committees and union leaders, and develop high-functioning leadership teams of district administrators and principals. They are supported to spend a considerable portion of the first year working with key stakeholders—including, of course, the school committee—to examine district needs and develop a coherent, widely understood strategy and goals for addressing them. The goals established for the superintendent's first year need to take into account the timetable for that work and, at the same time, ensure forward momentum on important ongoing improvement efforts at the school and district levels.

To that end, the following four goals can serve as starting points for the superintendent and school committee as they collaborate to develop the goals to be included in the Superintendent's Annual Plan for the superintendent's first year.¹ The first two are district improvement goals. The third is a goal related to the superintendent's own professional practice. The fourth can be a good starting point for implementing educator evaluation in the district in a fair, transparent manner.

¹ Joan Connolly, retired superintendent from Winthrop and Malden, contributed to the development of these examples. Dr. Connolly directs the New Superintendent Induction Program.

Goal 1: Effective Entry and Direction Setting. By early spring, the district will have broad agreement from key stakeholder groups about (a) the district's most critical needs, (b) the strategies and goals that will address them most effectively, and (c) the measures that will be used to assess progress.

Key Actions

1. By mid-August,² present to the school committee a written Entry Plan, including (a) types of evidence to be analyzed, (b) stakeholders to be interviewed, (c) methods for assessing instructional practice, and (d) methods for assessing district systems of support including financial management, human resources, and operations.
2. By December, complete and present a report of Entry Findings that (a) synthesizes evidence collected, (b) identifies strengths of the system and the most critical areas for improvement that require further inquiry, and (c) identifies next steps for study.
3. By March, propose key strategies to improve student learning and other district systems of support.
4. By April, collaborate with school committee to identify three to five student learning and district improvement goals.
5. Secure stakeholder feedback about engagement, awareness, and commitment to the strategies and goals.

Benchmarks

1. Presentations completed on schedule (process).
2. Goals adopted (process).
3. Results of spring survey of key stakeholder groups demonstrate engagement (85 percent), awareness (75 percent), and agreement (60 percent) (outcomes).

² This timetable applies to superintendents who begin July 1; it will need to be adapted for those starting at other times.

Goal 2: Maintaining Momentum During the Transition. Keep the district moving forward during this year's transition in leadership by working with principals and other district leaders to ensure that meaningful progress is made on critical district and school goals.

Key Actions

1. Within six weeks, complete with all principals and district administrators Steps 1 and 2 of the new Educator Evaluation Cycle (Self-Assessment; Analysis, Goal Setting, and Educator Plan Development).
2. By end of February, complete Formative Evaluation conferences with each principal and the district administrators the superintendent supervises.
3. By late spring, conduct at least three school and classroom visits to each school.³
4. By June 30, complete Summative Evaluation Reports for supervisees and analyze goal attainment.

Benchmarks

1. Completed Educator Evaluation Plans (process).
2. Log demonstrating at least three visits per school (process).
3. Analysis of Summative Evaluation Reports demonstrates meets or exceeds rating on 75 percent of principal and district administrator goals (outcome).

Goal 3: (Professional Practice) New Superintendent Induction Program. Develop skills in strategy development, data analysis, and instructional leadership by completing the first year of the New Superintendent Induction Program and earning at least *Proficient* ratings on each major assignment.

Key Actions

1. Attend eight daylong sessions.
2. Complete all assignments.
3. Consult with my assigned coach at least monthly.

Benchmarks

1. Calendar documents attendance and contact with coach (process).
2. Rubric rating on each assignment demonstrates proficiency (process and outcome).

The superintendent and school committee may consider a fourth goal. Pursuing this goal will help a district implement the new educator evaluation system at the same time as the district leadership team is strengthened in ways that will lead to improvements in teaching and learning districtwide.

³ In districts with more than 10 schools, responsibility for school visits may need to be shared with one or more assistant superintendents.

Goal 4: Fair, Effective Classroom Teacher Evaluation. By June, principals' and district administrators' ratings of classroom instruction will reflect a shared understanding of what classroom instruction entails when it is being done at the *Proficient* level.

Key Actions

1. Monitor the frequency of principal visits to classrooms and review the quality of their feedback to teachers.
2. Devote time at five leadership team meetings to viewing digital recordings of teaching and sharing conclusions about the level of practice observed.
3. During school visits, observe classrooms with the principal and share conclusions about the level of practice observed.

Benchmark

June administrator ratings of selected digital recordings of classroom instruction are comparable (outcome).

Appendix I. What Changes in the Process Should Be Considered for Superintendents Serving More Than One School Committee?

School committees and superintendents need to consider how to adapt the process for superintendents who serve more than one school committee. If the goal-setting process outlined in Step 2 is completed independently by each school committee, the resulting set of three to six goals from each committee may prove unwieldy. A similar problem is posed by the rubric review process through which committees establish priority Standards and Indicators and the relative weight that goal attainment will play in the evaluation process. If done separately by each committee, the rubric review process can leave the superintendent confronting competing, and possibly conflicting, priorities.

For both of these reasons, the school committees and superintendent should consider establishing a process through which the committees—all members or designated members of each—will meet publicly as a committee of the whole for the purpose of establishing the four to six goals and establishing any priorities that will guide the evaluation process. Some committees may conclude that it also makes sense to join together to conduct Step 5 of the process (End-of-Cycle Summative Evaluation) as well.

Appendix J. How Do the Open Meeting and Public Records Laws Affect the Superintendent Evaluation Process?

The Attorney General has issued guidance in the form of responses to frequently asked questions concerning superintendent evaluations pursuant to the revised Open Meeting Law (c. 28, s. 18 2009).

1. May a public body perform an evaluation of an employee in executive session?

No. Deliberations conducted for the explicit purpose of evaluating the professional competency of an individual may not occur during an executive session. See G.L. c.30A, s.21(a)(1). While conclusions drawn from deliberations about professional competency may be part of a deliberation for another executive session purpose, the evaluation of professional competency, itself, must occur during open session. For example, as part of the discussion in preparation for renegotiating a superintendent's contract, a school committee may wish to consider the results of an annual professional competency evaluation. The evaluation results may be considered as part of deliberations about strategy held in executive session, however, only after deliberations about professional competency were held during a previously convened open session.

2. Are individual evaluations completed by members of public bodies public records?

Yes. The Open Meeting Law carves out an exception from the Public Records Law for "materials used in a performance evaluation of an individual bearing on his professional competence," that were created by members of a public body and used during a meeting. See G.L. c. 30A, s.22(e). Individual evaluations created and used by members of a public body for the purpose of evaluating an employee are public records. Comprehensive evaluations that aggregate the individual public body members' evaluations are also public records if they are used during the course of a meeting. However, evaluations conducted by individuals who are not members of public bodies are not public records. For example, the individual evaluations created by municipal employees in response to a request for feedback on the town administrator are not public records, provided the employees completed the evaluations are not also members of the public body tasked with evaluating the town administrator's professional competency.

3. May the individual evaluations of an employee be aggregated into a comprehensive evaluation?

Yes. Members of a public body may individually create evaluations, and then submit them to an individual to aggregate into a master evaluation document to be discussed at an open meeting. Ideally, members of the public body should submit their evaluations for compilation to someone who is not a member of the public body, for example, an administrative assistant. If this is not a practical option, then the chair or other designated public body member may compile the evaluation. However, once the individual evaluations are submitted for aggregation there should be no deliberation among members of the public body regarding the content of the evaluations outside of an open meeting, whether in person or over email.

4. May a public body discuss issues relative to the salary of a public employee in executive session?

It depends. Discussions of salary issues may only occur in executive session as part of a contract negotiation. See G.L. c.30A, s.21(a)(2), (3). Other discussions related to salary, such as a discussion about whether an employee's job performance merits a bonus or salary increase, must be conducted in open session.

Appendix A. Superintendent Rubric





Standards and Indicators of Effective Administrative Leadership Practice: Rubric

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

Indicator I-A. Curriculum: Ensures that all instructional staff design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measurable outcomes.				
I-A. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-A-1. Standards-Based Unit Design	Does not set the expectation that administrators use effective strategies for ensuring development of well-designed standards-based units, provide adequate resources or support for this activity, and/or monitor or assess progress.	Provides limited training and/or support to administrators to employ effective strategies for ensuring well-designed standards-based units. May sometimes monitor and assess progress and provide feedback.	Provides support and assistance for administrators to learn and employ effective strategies for ensuring that educators and educator teams design standards-based units with measurable outcomes and challenging tasks requiring higher-order thinking. Frequently monitors and assesses progress, providing feedback as necessary.	Empowers administrators to employ strategies that empower staff to create rigorous standards-based units of instruction that are aligned across grade levels and content areas. Continually monitors and assesses progress, provides feedback, and connects administrators to additional supports as needed. Is able to model this element.
I-A-2. Lesson Development Support	Does not state expectations for administrators that they establish effective strategies to ensure development of well-structured lessons, does not provide training or support, and/or does not discriminate between strong and weak strategies for ensuring effective lesson-planning practices.	Provides limited training to administrators on how to establish effective strategies for ensuring that educators develop well-structured lessons and/or does not consistently identify and/or address patterns when there is evidence of a weak strategy being employed.	Supports administrators to learn and establish effective strategies for ensuring that educators develop well-structured lessons with challenging, measurable objectives and appropriate student engagement strategies, pacing, sequence, activities, materials, technologies, and grouping.	Supports administrators to collaborate on developing strategies that enable educators to consistently develop series of interconnected, well-structured lessons with challenging objectives and appropriate student engagement strategies, pacing, sequence, materials, and grouping and identifies specific exemplars and resources in each area. Is able to model this element.

Note: At the *Exemplary* level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "Is able to model."



Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator I-B. Instruction: Ensures that practices in all settings reflect high expectations regarding content and quality of effort and work, engage all students, and are personalized to accommodate diverse learning styles, needs, interests, and levels of readiness.					
I-B. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary	
I-B-1. Instructional Practices	Does not look for evidence of and/or cannot accurately identify ways that principals identify effective teaching strategies when the principals observe practice and review unit plans..	While the superintendent may observe principal practice and artifacts, s/he only occasionally looks for evidence that principals are identifying effective teaching strategies and practices when they observe practice and review unit plans.	While observing principal practice and artifacts, ensures that principals identify a variety of effective teaching strategies and practices when they observe practice and review unit plans.	While observing principal practice and artifacts, ensures that principals know and employ effective strategies and practices for helping educators improve instructional practice. Is able to model this element.	
I-B-2. Quality of Effort and Work	Does not set high expectations for the quality of content, student effort, and/or student work district-wide, or expectations are inappropriate.	May set high expectations for the quality of content, student effort, and student work district-wide, but allows expectations to be inconsistently applied across the district.	Sets and models high expectations for the quality of content, student effort, and student work district-wide and empowers administrators, educators and students to uphold these expectations consistently.	Sets and models high expectations for the quality of content, student effort, and student work district-wide and empowers administrators, educators and students to uphold these expectations consistently. Is able to model this element.	
I-B-3. Diverse Learners' Needs	Does not look for evidence of and/or cannot accurately identify ways that principals identify effective teaching strategies and practices that are appropriate for diverse learners.	While the superintendent may observe principal practice, s/he only occasionally looks for evidence that principals are identifying effective teaching strategies and practices that are appropriate for diverse learners when they observe practices and review unit plans.	While observing principal practice, ensures that principals look for and identify a variety of teaching strategies and practices that are effective with diverse learners when they observe practices and review unit plans.	Employs strategies that ensure that principals know and consistently identify teaching strategies and practices that are meeting the needs of diverse learners while teaching their content. Is able to model this element.	

Note: At the *Exemplary* level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "is able to model."



Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator I-C. Assessment: Ensures that all principals and administrators facilitate practices that propel personnel to use a variety of formal and informal methods and assessments to measure student learning, growth, and understanding and make necessary adjustments to their practice when students are not learning.				
I-C. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-C-1. Variety of Assessments	Does not communicate or monitor a strategy for assessments, leaving it up to administrators to design and implement their own strategies.	Provides administrators with some formal assessment options and suggests that they coordinate their assessment practices within their teams and include a variety of assessments but does not monitor this practice.	Supports administrator teams to use a variety of formal and informal methods and assessments, including common interim assessments that are aligned across grade levels and subject areas.	Leads administrator teams to develop and implement a comprehensive assessment strategy that includes ongoing informal assessments and common interim assessments that are aligned across grade levels and subject areas. Is able to model this element.
I-C-2. Adjustment to Practice	Does not encourage or facilitate administrator teams to review assessment data.	Suggests that administrator teams meet to review data and plan for adjustments and interventions but inconsistently monitors this practice.	Provides the resources for planning time and effective support for administrator teams to review assessment data and identify appropriate interventions and adjustments to practice. Monitors administrators' efforts and successes in this area.	Leads, plans, facilitates, and supports administrator team review meetings after each round of assessments. Monitors teams' plans, adjustments to instruction, and outcomes and shares lessons learned with others. Is able to model this element.

Note: At the *Exemplary* level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "Is able to model."



Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator I-D. Evaluation: Provides effective and timely supervision and evaluation of all staff in alignment with state regulations and contract provisions.

I-D. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-D-1. Educator Goals	Does not support administrators to develop professional practice, student learning and/or district/school improvement goals, review the goals for quality, and/or support administrators in attaining goals.	Supports administrators and administrator teams to develop professional practice, student learning and, where appropriate, district/school improvement goals but does not consistently review them for quality and/or monitor progress.	Supports administrators and administrator teams to develop and attain meaningful, actionable, and measurable professional practice, student learning, and where appropriate, district/school improvement goals.	Supports administrators and administrator teams to develop and attain meaningful, actionable, and measurable professional practice, student learning and district/school improvement goals and models this process through the superintendent's own evaluation process and goals. Is able to model this element.
I-D-2. Observations and Feedback	Rarely conducts visits to observe principal practice and/or does not provide honest feedback to administrators who are not performing proficiently.	Makes infrequent unannounced visits to schools to observe principal practice, rarely provides feedback that is specific and constructive for administrators, and/or critiques struggling administrators without providing support to improve their performance.	Typically makes at least three unannounced visits to each school to observe principal practice every year and provides targeted constructive feedback to all administrators. Acknowledges effective practice and provides redirection and support for those whose practice is less than <i>Proficient</i> .	Makes unannounced visits to schools throughout the year to observe administrator practice and provides targeted constructive feedback to all administrators. Engages with all in conversations with all administrators about improvement, celebrates effective practice, and provides targeted support to administrators whose practice is less than <i>Proficient</i> . Is able to model this element.
I-D-3. Ratings	Assigns ratings for performance, goal attainment, and impact on student learning without collecting and analyzing sufficient and/or appropriate data or does not assign ratings for some administrators.	Assigns ratings for performance, goal attainment, and impact on student learning in a way that is not consistently transparent to administrators.	Exercises sound and reliable judgment in assigning ratings for performance, goal attainment, and impact on student learning and ensures that administrators understand their ratings.	Exercises sound and reliable judgment in assigning ratings for performance, goal attainment, and impact on student learning. Ensures that administrators understand in detail why they received their ratings and provides effective support around this practice is able to model this element.

Note: At the *Exemplary* level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "Is able to model."



Standards and Indicators of Effective Administrative Leadership Practice: Rubric

I-D. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-D-4. Alignment Review	Does not review alignment between judgment about practice and data about student learning when evaluating and rating administrators.	Occasionally reviews alignment between judgment about practice and student learning data.	Consistently reviews alignment between judgment about practice and student learning data and provides guidance to administrators to make informed decisions about educator support and evaluation based upon this review.	Studies alignment between judgment about practice and data about student learning when evaluating and rating administrators and provides effective support around this practice. Is able to model this element.

Note: At the *Exemplary* level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "Is able to model."

Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator I-E. Data-Informed Decision Making: Uses multiple sources of evidence related to student learning, including state, district, and school assessment results and growth data, to inform school and district goals and improve organizational performance, educator effectiveness, and student learning.				
I-E. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-E-1. Knowledge and Use of Data	Relies on too few data sources to represent the full picture of school or district performance, and/or does not analyze the data accurately.	May work with administrators to identify multiple sources of student learning data, but these data do not provide multiple perspectives on performance, and/or analysis of the data is sometimes inaccurate.	Guides administrators and supports them in identifying a range of appropriate data sources and effectively analyze the data for decision-making purposes.	Leads administrator teams to identify a range of appropriate data sources, including non-traditional information that offers a unique perspective on school and district performance, and models effective data analysis for staff. Is able to model this element.
I-E-2. School and District Goals	Gathers limited information on school and district strengths and weaknesses and/or does not use these data to inform district plans or actions.	Assesses school and district strengths and weaknesses using data that are not carefully analyzed and/or writes an unfocused strategic plan.	Uses data to accurately assess school and district strengths and areas for improvement to inform the creation of focused, measurable district goals. Provides support to principals in their efforts to create focused, measurable school goals.	Involves stakeholders in a comprehensive diagnosis of school and district strengths and weaknesses using appropriate data, and leads a collaborative process to develop a focused, results-oriented strategic plan with annual goals. Is able to model this element.
I-E-3. Improvement of Performance, Effectiveness, and Learning	Does not share assessment data with administrators or provide them with resources and support to use data to make adjustments to school or district plans, and/or model appropriate data analysis strategies.	Shares limited data with administrators to identify student and/or educator subgroups that need support; provides limited assistance to administrator teams in using data to improve performance.	Uses multiple data sources to evaluate administrator and district performance. Provides administrators and administrator teams with the resources and support to disaggregate assessment data and assists them in identifying students who need additional support.	Uses multiple data sources to evaluate administrator and district performance. Provides administrators and administrator teams with the resources and support to disaggregate assessment data and assists them in identifying students who need additional support. Empowers educators to use a range of data sources to pinpoint areas for their own and schoolwide improvement. Is able to model this element.

Note: At the Exemplary level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "Is able to model."



Standards and Indicators of Effective Administrative Leadership Practice: Rubric

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

Indicator II-A. Environment: Develops and executes effective plans, procedures, routines, and operational systems to address a full range of safety, health, and emotional and social needs.				
II-A. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-A-1. Plans, Procedures, and Routines	Does not organize the district effectively for orderly and efficient movement of students.	May establish plans, procedures, and routines to guide administrators, but student entry, dismissal, meals, class transitions, assemblies, and recess are not consistently orderly and/or efficient.	Develops systems, plans, procedures, and routines for administrators to implement that generally ensure orderly and efficient student entry, dismissal, meals, class transitions, assemblies, and recess.	Establishes systems, plans, procedures, and routines that empower administrators, students and staff to implement orderly and efficient student entry, dismissal, meals, class transitions, assemblies, and recess. Is able to model this element.
II-A-2. Operational Systems	Fails to establish systems and procedures to support custodial and/or other staff, so that the campus is not generally clean, attractive, welcoming, and/or safe.	Develops systems and procedures that result in inconsistent supervision and/or support of custodial and other staff, resulting in a campus that is not consistently clean, attractive, welcoming, or safe.	Develops systems and procedures for the effective supervision and support of custodial, clerical, food services, and other staff effectively so that the campus is clean, attractive, welcoming, and safe.	Creates and maintains a district environment in which custodial and other staff take personal responsibility for keeping the campus clean, attractive, welcoming, and safe. Is able to model this element.
II-A-3. Student Safety, Health, and Social and Emotional Needs	Does not develop consistent procedures for student discipline; district disciplinary practice varies from school to school; often tolerates discipline violations and/or enforces district policies or procedures inconsistently.	May urge administrators to demand good student behavior but allows varying standards to exist in different schools. Supervises and supports administrators in addressing student discipline and bullying matters on a case-by-case basis in the absence of a system of procedures and consequences.	Supports administrator teams in developing systems and procedures for positive student behavior; models high expectations for student behavior and provides appropriate training for administrators to uphold these expectations. Establishes district-wide routines and consequences, including policies and systems to prevent and address bullying and other behaviors that threaten students' social and emotional well-being.	Guides administrators and teams to develop practices that consistently showcase high expectations for student behavior and invest staff and students in upholding these expectations. Successfully implements district-wide routines and consequences such that students take ownership over addressing bullying and other behaviors that threaten students' social and emotional well-being. Is able to model this element.

Note: At the *Exemplary* level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "Is able to model."



Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator II-B. Human Resources Management and Development: Implements a cohesive approach to recruitment, hiring, induction, development, and career growth that promotes high-quality and effective practice.				
II-B. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-B-1. Recruitment and Hiring Strategies	Does not successfully lead the recruitment and hiring process.	Leads the recruitment and hiring process but does not consistently identify effective administrators and educators.	Leads the district's recruitment and hiring process and, through it, consistently identifies effective administrators and educators who share the district's mission.	Consistently identifies effective administrators and educators who share the district's mission. Empowers administrators and faculty members to share in a structured, consistent interview process. Is able to model this element.
II-B-2. Induction, Professional Development, and Career Growth Strategies	Does not support new administrators, provide guidance to them to support educators, organize high-quality job-embedded professional development, and/or support the career growth of effective educators.	Develops only a limited district-wide induction program for new administrators and teachers and/or inconsistently implements the district's induction strategy; organizes job-embedded professional development that is not consistently high quality or aligned with goals; and/or does not consistently support effective administrators' and educators' career growth. Does not establish criteria for the awarding of professional status.	Develops district-wide induction support for new administrators and teachers and/or faithfully implements the district's induction strategy; organizes high-quality job-embedded professional development aligned with district goals; and supports the career growth of effective professional personnel by distributing leadership tasks, developing criteria for the awarding of professional status, and monitoring progress and development.	Facilitates the administrator-led design and implementation of induction support, job-embedded professional development, and career growth support all of which are aligned with district goals; are consistently viewed by professional personnel as effective and helpful, and provide multiple opportunities for administrator and educator growth and learning. Leads the administrator team in developing district criteria for the awarding of professional status. Is able to model this element.

Note: At the *Exemplary* level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "Is able to model."



Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator II-C. Scheduling and Management Information Systems: Uses systems to ensure optimal use of data and time for teaching, learning, and collaboration, minimizing disruptions and distractions for school-level staff.				
II-C. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-C-1. Time for Teaching and Learning	Does little to minimize disruptions to instructional time and minimize disruptions and distractions for school-level staff, including principals.	Generally acts to minimize disruptions to instructional time and minimize disruptions and distractions for school-level staff, including principals.	Creates schedules, procedures and related systems that maximize instructional time and minimize school day disruptions and distractions for school-level staff, including principals; and consistently monitors the extent to which these systems are effective	Empowers administrators and teams to contribute to the design and monitoring of district systems that maximize instructional time and minimize disruptions and distractions for all school-level staff. Is able to model this element.
II-C-2. Time for Collaboration	Sets unrealistic expectations for administrator team meetings if at all and/or does not create a schedule that provides adequate meeting time for teams. Does not work to prevent or deflect time-wasting activities. Does not establish norms for the administrator team meetings.	Sets inconsistent expectations for administrator team meetings and/or creates a schedule that only provides adequate meeting time for some team meetings. Works to prevent or deflect activities with limited success. Norms for team behavior are unclear and/or not consistently practiced.	Sets expectations for administrator team meetings and creates a schedule that provides sufficient meeting time for all team meetings. Prevents or deflects activities that interfere with administrators' ability to focus on the agenda during team time. Establishes norms for effective team behavior.	Is transparent and forthcoming about expectations for all administrator team meetings; creates and implements a schedule that maximizes meeting time for all team members. Collaborates with team members to develop team norms. Is able to model this element.

Note: At the *Exemplary* level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "Is able to model."



Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator II-D. Laws, Ethics, and Policies: Understands and complies with state and federal laws and mandates, school committee policies, collective bargaining agreements, and ethical guidelines.				
II-D. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-D-1. Laws and Policies	Demonstrates lack of awareness or consistent non-compliance with some or all state and federal laws and mandates, school committee policies, or collective bargaining agreements.	May know state and federal laws and mandates, school committee policies, and collective bargaining agreements, but inconsistently complies with some laws or policies.	Understands and complies with state and federal laws and mandates, school committee policies, and collective bargaining agreements. Provides the resources and support to ensure district-wide compliance.	Provides the resources and support for all school personnel to understand and comply with state and federal laws and mandates, school committee policies, and collective bargaining agreements. Is able to model this element.
II-D-2. Ethical Behavior	Demonstrates lack of sound judgment reflecting integrity and fairness and/or does not adequately protect administrator, student, family, and/or staff confidentiality.	Generally demonstrates sound judgment reflecting integrity and fairness with occasional lapses in judgment and/or does not always protect administrator, student, family, and staff confidentiality appropriately.	Reliably demonstrates sound judgment reflecting integrity and fairness; protects administrator, student, family, and staff confidentiality appropriately; and expects all district personnel to reflect this practice.	Reliably demonstrates sound judgment reflecting integrity and fairness; protects administrator, student, family, and staff confidentiality appropriately. Effectively supports all staff to do both as well. Is able to model this element.

Indicator II-E. Fiscal Systems: Develops a budget that supports the district's vision, mission, and goals; allocates and manages expenditures consistent with district- and school-level goals and available resources.			
II-E. Elements	Unsatisfactory	Needs Improvement	Proficient
II-E-1. Fiscal Systems	Builds a budget that does not align with the district's goals or mismanages available resources.	Develops a budget that loosely aligns with the district's vision, mission, and goals or inconsistently manages expenditures and available resources.	Develops a budget that aligns with the district's vision, mission, and goals. Allocates and manages expenditures consistent with district/school-level goals and available resources.
			Leads the administrator team to develop a district budget that aligns with the district's vision, mission, and goals with supporting rationale; uses budget limitations to create new opportunities for improvement, when possible; allocates and manages expenditures consistent with district/school-level goals; and seeks alternate funding sources as needed. Is able to model this element.

Note: At the *Exemplary* level, an educator's level of expertise is such that he or she is able to model this element through training, teaching, coaching, assisting, and/or demonstrating. In this rubric, this level of expertise is denoted by "Is able to model."



Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Standard III: Family and Community Engagement. *Promotes the learning and growth of all students and the success of all staff through effective partnerships with families, community organizations, and other stakeholders that support the mission of the school and district.*

Indicator III-A. Engagement: Actively ensures that all families are welcome members of the classroom and school community and can contribute to the effectiveness of the classroom, school, district and community.				
III-A. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
III-A-1. Family Engagement	Does little to welcome families as members of the district, classroom or school community or tolerates an environment that is unwelcoming to some families.	May provide some resources and support and make some attempts to welcome families as members of the district, classroom and school community but does not consistently use culturally sensitive practices and/or work to identify and remove barriers to family involvement.	Provides resources and support for all personnel to use culturally sensitive practices to ensure that all families are welcome and can contribute to the district, classroom, school and community's effectiveness. Works with administrators to identify and remove barriers to families' involvement, including families whose home language is not English.	Provides resources and support for all personnel to use culturally sensitive practices and successfully engages most families, ensuring that all families are welcome and can contribute to district, classroom, school, and community effectiveness. Works with administrators, families, and organizations to identify and remove barriers to family involvement, including families whose home language is not English. Is able to model this element.
III-A-2. Community and Business Engagement	Limits work to the immediate context of the schools. Does not make efforts to reach out to community organizations, community members, or businesses that could otherwise contribute to district effectiveness.	Engages some community organizations, community members, and/or businesses in annual district events but does not make efforts to increase their involvement to maximize community contributions for district effectiveness.	Establishes ongoing relationships with community organizations, community members, and businesses. Engages them to increase their involvement to maximize community contributions for district effectiveness.	Establishes strategic partnerships with community organizations, community members, and businesses that improve district effectiveness. Works to increase the types and number of organizations with whom the district partners in order to deepen relationships and increase partner contribution. Is able to model this element.

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Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator III-B. Sharing Responsibility: Continuously collaborates with families and community stakeholders to support student learning and development at home, school, and in the community.				
III-B. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
III-B-1. Student Support	Does not work with administrators to support educators to identify student needs, does not work with administrators to support families to address student needs, and/or does not draw upon internal or external resources.	Asks administrators to identify students struggling academically or behaviorally and/or work with a limited number of families to address student needs, utilizing a limited set of resources.	Provides resources and support to enable administrators and educators to identify each student's academic, social, emotional, and behavioral needs, including students with disabilities and English learners. Collaborates with administrators to support families to effectively address student needs and prevent further challenges, connecting students with a network of resources within and outside the district. Is able to model this element.	Provides resources and support to enable administrators and educators to identify each student's academic, social, emotional, and behavioral needs, including students with disabilities and English learners. Collaborates with administrators to support families to effectively address student needs and prevent further challenges, connecting students with a network of resources within and outside the district. Is able to model this element.
III-B-2. Family Collaboration	Does not set clear expectations or provide support for administrators to regularly communicate with families on ways to support their children's learning at home and at school.	Sets general expectations and provides occasional support for administrators to engage families in supporting their children's learning at school and at home and/or supporting their children with disabilities or limited English proficiency.	Sets clear expectations for and supports administrators to regularly engage families in supporting learning at school and home, including appropriate adaptation for students with disabilities or limited English proficiency.	Sets clear expectations and provides differentiated resources to support administrators to consistently and regularly engage all families in supporting their children's learning at school and home, including families and children with limited English proficiency and/or children with disabilities. Is able to model this element.

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Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator III-C. Communication: Engages in regular, two-way, culturally proficient communication with families and community stakeholders about student learning and performance.				
III-C. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
III-C-1. Two-Way Communication	Does not set clear expectations for or provide support to administrators to communicate with families. District communication regarding student learning and performance primarily occurs through school report cards.	May set expectations for and provide limited support to administrators to communicate with families but does not stress the importance of two-way communication channels. District communication regarding student learning and performance primarily occurs through school newsletters and other one-way media.	Sets clear expectations for and provides support to administrators to communicate regularly with families using two-way communication channels, including careful and prompt response to communications from families. Supports administrators to maximize the number of face-to-face family/teacher interactions.	Sets clear expectations for and provides differentiated support to ensure that all administrators design and implement frequent personalized communications, respond carefully and promptly to communications from families, and solicit feedback from families that informs improvement to communication plans. Is able to model this element.
III-C-2. Culturally Proficient Communication	Does not set clear expectations for or provide support to administrators regarding culturally sensitive communication and/or allows inappropriate disrespectful communication with families that ignores different family cultural norms.	May set expectations for administrators regarding culturally sensitive communication but does not provide support to them; and/or occasionally communicates in ways that are culturally insensitive to some families' home language, culture, and values.	Sets clear expectations for and provides support to administrators regarding culturally sensitive communication. Ensures that district-wide communication with families is always respectful and demonstrates understanding of and sensitivity to different families' home language, culture, and values.	Sets clear expectations for, models, and provides differentiated support regarding culturally sensitive communication. Ensures that district-wide communication with families is always respectful and demonstrates understanding and appreciation of different families' home language, culture, and values. Is able to model this element.
Indicator III-D. Family Concerns: Addresses family and community concerns in an equitable, effective, and efficient manner.				
III-D. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
III-D-1. Family Concerns	Fails to provide systems and support for personnel to consistently reach out to families in response to concerns, and agreed-upon solutions are often not in the best interest of students.	May systems and support to address concerns with families as they arise, but agreed-upon solutions are not always in the best interest of students.	Provides systems, and support for administrators to reach out to families as concerns arise and works to reach equitable solutions in the best interest of students.	Provides system and support for all school personnel to reach out to families proactively, as soon as concerns arise. Effectively reaches equitable solutions that satisfy families, faculty, and staff and are in the best interest of students. Is able to model this element.

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Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Standard IV: Professional Culture. *Promotes success for all students by nurturing and sustaining a school culture of reflective practice, high expectations, and continuous learning for staff.*

Indicator IV-A. Commitment to High Standards: Fosters a shared commitment to high standards of service, teaching and learning with high expectations for achievement for all.				
IV-A. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-A-1. Commitment to High Standards	Does not encourage high standards of teaching and learning or high expectations for achievement with the administrator team, and/or may demonstrate low expectations for faculty and staff.	May ask administrators for commitment to high standards of teaching and learning with high expectations for achievement for all but does not support and/or model it.	Fosters a shared commitment to high standards of teaching and learning, with high expectations for achievement for all.	Leads administrators in developing a shared commitment to high standards of teaching and learning with high expectations for achievement for all. Revisits and renews commitment with administrator team regularly. Is able to model this element.
IV-A-2. Mission and Core Values	Does not develop core values and mission statements for the school.	May develop core values and mission statements but rarely uses them to guide decision making.	Develops, promotes, and models commitment to core values that guide the development of a succinct, results-oriented mission statement and ongoing decision making.	Leads administrators to develop core values and mission statements, share these statements with families and the school district community, and use them to guide decision making. Is able to model this element.
IV-A-3. Meetings	Leads administrator meetings that lack clear purpose and/or are primarily used for one-way informational updates.	May lead administrator meetings that include both one-way informational updates and participatory activities focused on matters of consequence, but does not clearly establish norms.	Plans and leads well-run and engaging administrator meetings that have clear purpose, focus on matters of consequence, and engage participants in a thoughtful and productive series of conversations and deliberations. Establishes clear norms for administrator team behavior.	Plans and facilitates engaging administrator team meetings in which small groups of administrators learn together and create solutions to instructional leadership issues. Team has established norms for behavior and consistently adheres to them. Consistently evaluates the effectiveness of the administrator team meetings. Is able to model this element.

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Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator IV-B. Cultural Proficiency: Ensures that policies and practices enable staff members and students to interact effectively in a culturally diverse environment in which students' backgrounds, identities, strengths, and challenges are respected.				
IV-B. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-B-1. Policies and Practices	Develops and implements culturally insensitive or inappropriate policies, does not support administrators and staff in building cultural proficiency, and/or creates a culture that minimizes the importance of individual differences.	Takes pride in having a diverse administration, faculty and/or student body, but some policies are not culturally sensitive; and/or provides limited resources for administrators to support the development of cultural proficiency.	Develops and implements culturally sensitive policies that acknowledge the diverse backgrounds, identities, strengths, and challenges of administrators, students and staff. Provides administrators with relevant resources to support them in building cultural proficiency and promotes a culture that affirms individual differences.	Leads stakeholders to develop and implement culturally sensitive policies that acknowledge the diverse backgrounds, identities, strengths, and challenges of administrators, students and staff. Empowers administrators with time, resources, and support to build cultural proficiency and collaborates with community members to create a culture that affirms individual differences. Is able to model this element.

Indicator IV-C. Communications: Demonstrates strong interpersonal, written and verbal communication skills.				
IV-C. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-C-1. Communication Skills	Demonstrates ineffectual interpersonal, written, or verbal communication skills at times.	May demonstrate adequate interpersonal, written, and verbal communication skills but sometimes makes grammatical errors or has difficulty expressing ideas to stakeholders.	Demonstrates strong interpersonal, written, and verbal communication skills.	Demonstrates strong context- and audience-specific interpersonal, written, and verbal communication skills. Is able to model this element.

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Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator IV-D. Continuous Learning: Develops and nurtures a culture in which staff members are reflective about their practice and use student data, current research, best practices and theory to continuously adapt practice and achieve improved results. Models these behaviors in the administrator's own practice.				
IV-D. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-D-1. Continuous Learning of Staff	Accepts the practice of administrators working largely in isolation, without consideration of data and best practices, and/or discourages reflection among administrators, faculty and staff.	May encourage administrators to reflect on the effectiveness of interactions with faculty and students and to use data and best practices to adapt practice but does not support administrators in these practices.	Leads all administrators and teams to reflect on the effectiveness of interactions with faculty and students. Ensures that administrators use data, research, and best practices to adapt practice to achieve improved results.	Models for administrators how to reflect on the effectiveness of interactions with faculty and students and uses data, research, and best practices to adapt practice to achieve improved results. Supports all educators to work in teams as often as is feasible and appropriate. Is able to model this element.
IV-D-2. Continuous Learning of Administrator	Does not reflect on personal practice or demonstrate new ways of thinking about administration and leadership.	Occasionally reflects on personal practice, sets meaningful goals, and/or researches ways to improve efficiency and practice.	Reflects on and improves personal practice, sets meaningful goals, and develops new approaches in order to improve efficiency and practice.	Demonstrates openness and commitment to learning; reflects on personal practice; and relies on student data, current research, and best practice to improve own leadership. Is able to model this element.

Indicator IV-E. Shared Vision: Continuously engages all stakeholders in the creation of a shared educational vision in which every student is prepared to succeed in postsecondary education and become a responsible citizen and global contributor.				
IV-E. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-E-1. Shared Vision Development	Does little to engage stakeholders in the creation of a shared educational vision, or the vision is disconnected from college and career readiness, civic engagement, and/or community contributions.	Engages administrators, staff, students, families, and community members in developing a vision focused on some aspects of student preparation for college and career readiness, civic engagement, and community contributions.	At all grade levels, continuously engages administrators, staff, students, families, and community members in developing a vision focused on student preparation for college and career readiness, civic engagement, and community contributions.	Leads administrators, staff, students of all ages, families, and community members to develop and internalize a shared educational vision around preparation for college and careers and responsible citizenship. Is able to model this element.

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Standards and Indicators of Effective Administrative Leadership Practice: Rubric

Indicator IV-F. Managing Conflict: Employs strategies for responding to disagreement and dissent, constructively resolving conflict and building consensus throughout a district or school community.				
IV-F. Elements	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-F-1. Response to Disagreement	Does not respond to disagreement or dissent and/or does not use appropriate, respectful, non-confrontational approaches.	May respond respectfully to disagreement and dissent, but responds inconsistently and does not always employ a non-confrontational approach	Employs a non-confrontational approach for responding respectfully and appropriately to disagreement and dissent, using both as opportunities for learning. Models this practice for the administrator team.	Models a variety of strategies for responding respectfully and effectively to disagreement and dissent, using both as opportunities for learning. Provides professional development for the administrator team to build these conflict resolution strategies. Is able to model this element.
IV-F-2. Conflict Resolution	Does not address conflicts in a solution-oriented and/or respectful manner.	May attempt to respectfully resolve conflicts as they arise, but employs only a limited range of strategies.	Consistently employs a variety of strategies to resolve conflicts in a constructive and respectful manner. Models this behavior for the administrator team.	Consistently employs a variety of strategies to resolve conflicts in a constructive and respectful manner and empowers and supports administrators to use these approaches. Is able to model this element.
IV-F-3. Consensus Building	Does not attempt to build consensus within the district community, or attempts at consensus-building around critical school decisions are unsuccessful.	Employs a limited number of strategies to build consensus within the school district community, with varying degrees of success.	Builds consensus within the school district community around critical school decisions, employing a variety of strategies.	Employs a variety of strategies to build consensus within the school district community around critical school decisions, while encouraging dialogue and different points of view. Is able to model this element.

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**Acton Public Schools
Acton-Boxborough Regional School District**

SUPERINTENDENT EVALUATION PROCESS - March 24, 2011

The Administrative Contract of Employment between the Superintendent of Schools and the School Committees states that the Superintendent will be evaluated on an annual basis. A written summary evaluation report will be distributed to all 2010-11 Committee members and the Superintendent. The Committees and Superintendent will meet within 30 days after the completion of the written report to discuss the evaluation.

The Committees and the Superintendent will meet in open session for the purpose of evaluating the Superintendent in the performance of his duties and responsibilities on behalf of the Acton Public and Acton-Boxborough Regional School Districts. This evaluation will be based upon the Superintendent's job description, the goals and objectives set for the year in which the evaluation occurs, and in accordance with the procedures established by the Committees for this purpose.

This discussion will be conducted with due regard for the value of praise and constructive criticism as tools for professional growth and improvement. All parties recognize the continuing need for mutual trust and understanding between the Committees and the Superintendent.

To meet the School Committees' contractual obligation to evaluate the Superintendent annually, an evaluation timetable will be promulgated jointly by the then current chairs of the Acton Public and Acton-Boxborough Regional Committee and distributed at the February meeting of the Regional Committee. Attachment 1 is the draft schedule for 2011.

The evaluation process will be managed by the chairs then current as of the February meeting of the Regional Committee. Participants will include Committee members as of that meeting.

At June Joint School Committee meeting:

School Committees vote summary evaluation and annual salary, effective July 1.

At July Joint School Committee workshop:

School Committees discuss Committee and system-wide goals for the coming school year.

At October School Committee meetings:

Superintendent presents the goals for the current school year to each Committee for acceptance.

At February School Committee meetings:

Superintendent presents an interim report on the status of the current year's goals

**Attachment 1- Draft Schedule -
Superintendent's Evaluation Timetable for 2011**

1. February 2011 School Committee meetings
 - Superintendent presents an interim report on the status of the current year's goals.
2. March 24, 2011 Joint School Committee meeting
 - The following evaluation documents are distributed to Committee members:
 - a. Superintendent Evaluation Process document (including evaluation timetable)
 - b. Form to be used for the annual evaluation of the Superintendent of Schools
 - c. Superintendent's job description
 - d. Status report on the current year's goals and objectives
 - e. Copy of previous year's evaluation (if applicable)
 - The chairs issue a general public request for input on Superintendent's performance
3. May 5, 2011 Regional School Committee meeting
 - The Superintendent reports on the status of the current year's goals.
 - The following evaluation document is distributed to Committee members:
 - a. Updated status report on the current year's goals and objectives
 - The chairs issue another general public request for input on Superintendent's performance
4. May 12, 2011
 - Completed evaluations are returned to outgoing Committee chairpersons and the School Committee secretary. Outgoing chairs will then draft a summary evaluation report.
 - Public input received.
5. May 19, 2011
 - Draft summary evaluation is returned to School Committee members for their comments and suggestions.
6. May 27, 2011
 - Evaluation summary is finalized by the outgoing Committee chairpersons based upon comments received.
7. June 2, 2011 Regional/Local/Joint School Committee meeting
 - Superintendent's summary evaluation is presented and voted.
 - Superintendent's salary is voted.

**Acton Public Schools
Acton-Boxborough Regional School District**

**ANNUAL EVALUATION
OF THE
SUPERINTENDENT OF SCHOOLS**

Purposes of the annual evaluation:

1. To provide School Committee members, as elected representatives of the community, with a framework for appraising the Superintendent's performance
2. To provide a medium through which the Superintendent receives meaningful direction, suggestions, and feedback.
3. To help the Superintendent formulate goals for the following school year

Directions for completing this form:

Please review the enclosed Superintendent's job description and the systems' goals and objectives before you complete this form. Each evaluator's comments should be objective and constructive.

Using a scale of 1 to 5, where 1 is the most favorable rating, 4 is the least favorable rating, and 5 indicates that the reviewer has no basis for comment, please rate the Superintendent's performance. Comments are mandatory for those items rated 3 or 4. Comments should be specific and clear and should, if possible, cite examples of policies, behaviors, initiatives and decisions.

Please sign the completed evaluation form and return it in the enclosed envelope to the School Committee secretary, Beth Petr, at the Central Office. Please be aware that all evaluation forms will be forwarded to the Superintendent after the summary evaluation report is written.

March 25, 2011

6.6.3

1 2 3 4 5
High Low

1.0 GOALS AND OBJECTIVES

1.1 Develops in cooperation with the School Committees and school staff the mission, vision, short and long term goals and objectives of the school systems.

Elicits ideas and contributions from all pertinent groups					
b. Supports the mission and vision statement with actions and decisions					
c. Recommends clearly defined annual goals and objectives for the school systems consistent with the mission and vision					
d. Leads the system in developing plans consistent with annual goals and objectives					

2.0 SYSTEM OPERATION

Overall operation of the school systems including personnel, organization, budget, curriculum, instructional and support programs and buildings and grounds

2.1 Manages all departments of the school systems consistent with the School Committees' policies and state and federal law.

a. Administers the schools in accordance with state and federal laws, and with the regulations of the Commonwealth's Board of Education					
b. Interprets, supports, and executes the intent of all school committee policies					
c. Reviews with school principals the role of school councils and relevant activities					

1 2 3 4 5
High Low

2.2 Takes such action as is necessary to carry out the daily operation of the schools, which in the judgment of the Superintendent is in the best interest of the school systems.

a. Demonstrates good judgment by making decisions based on the best interests of the educational systems					
b. Exhibits the necessary energy to meet the responsibilities of the position					
c. Maintains high standards of ethics, honesty and integrity in personal and professional matters					
2.3 Participates in personnel negotiations or delegates same, while maintaining strong oversight capacity as the representative of the School Committees					
2.4 Participates in personnel grievance and arbitration procedures as needed					

2.5 Directs studies of site and building needs and makes recommendations to the School Committees for meeting those needs

a. Provides updated evaluations of the physical plant integrated with long-range capital needs					
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2.6 Directs the preparation of an annual budget showing the estimated needs for ensuing fiscal year and then recommends appropriations for approval by the School Committees.

2.7 Develops a five-year budget projection of needs which accounts for changes in student population.					
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a. Coordinates preparation of annual budgets that are aligned with educational goals					
b. Presents the budgets in a manner that promotes understanding by the School Committees					
c. With the School Committees, presents the budgets to the school community, the town governments, and the public in a manner that promotes understanding					

1 2 3 4 5
High Low

d. Implements effective budget forecasting, accounting and control systems						
e. Provides creative management of available resources						
2.8 Selects certain teachers for special assignments in connection with the production of curriculum materials, professional development, studies of school systems needs or any other work of a special nature which contributes to the improvement of the school systems.						
2.9 Hires personnel consistent with program and budget guidelines.						
2.10 Prepares, in cooperation with the School Committee chairpersons, the agendas for the School Committee meetings.						
a. Establishes clear direction for School Committee meetings by providing agendas and support material that allow for balanced, reasoned policy formation and decision making						
b. Provides the School Committees with pertinent and timely information						
c. Maintains a professional working relationship with the School Committees and individual committee members						

1 2 3 4 5
High Low

3. POLICIES AND ADMINISTRATIVE PROCEDURES

3.1 With the School Committees, initiates and guides development of policies for approval by the School Committees.

3.2 Develops and implements through associates and staff administrative procedures necessary to accomplish the School Committees' policies.

3.3 Promptly completes and files all reports as required by law with the appropriate state agencies with the assistance of staff.

3.4 Develops and coordinates a process of continuous review of existing policies/procedures and makes appropriate recommendations.

a. Recommends new policies and/or policy revisions as needed

b. Offers professional advice to School Committees on items requiring School Committee action, with appropriate recommendations and options based on thorough study and analysis

c. Interprets, supports and implements School Committee policies and directives

4.0 SUPERVISION AND EVALUATION

4.1 Supervises and evaluates the personnel reporting directly to him.

4.2 Oversees the implementation of the staff evaluation process for the district.

a. Develops and executes sound personnel procedures and practices

b. Encourages good staff morale and loyalty to the school systems.

FUNCTION

COMMENTS

Spring 2011

RATING

1 2 3 4 5
High Low

c. Approaches personnel decisions in a non-discriminatory manner.					
d. Provides for a meaningful and balanced staff development and certification program that is available to all school district employees					
4.3 Oversees the evaluation of school programs.					
a. Assists the School Committees to monitor school system performance.					

5.0 SCHOOL-COMMUNITY RELATIONS

5.1 Plans and implements a school-community relations program.					
a. Works cooperatively with local government leaders and other agencies of the towns through frequent meetings, exchanges of information and common planning					
b. Maintains a community respect and support for the operation of the schools					
b. Encourages community involvement in schools					
c. Interacts with community groups					
e. Presents a strong, positive attitude to build public support for the school system					
f. Supports the creation of partnerships with the immediate and larger community					
5.2 Meets regularly with parent groups.					
a. Encourages parent support and involvement in the schools					

FUNCTION

COMMENTS

Spring 2011

RATING

1 2 3 4 5
High Low

b. Demonstrates ability to work well with individuals and groups						
c. Involves parents and community in curriculum development and assessment when appropriate						
d. Listens to parent concerns						
5.3 Supplies information to the media.						
a. Continues to refine and implement a plan for working with the news media.						
5.4 Produces newsletters, uses Internet and other communications vehicles as needed.						
5.5 Directs the preparation of an annual report to be completed for the Annual Town Meetings.						
5.6 Participates in the activities of collaboratives (CASE, EDCO, etc.), which enhance school program.						
a. Keeps abreast of the latest developments in the field of education through participation or attendance at meetings of key professional organizations						
b. Advises the School Committees regarding opportunities for influence						

6.0 SPECIAL PROJECTS

6.1 Oversees the progress of the school building projects.						
6.2 Reports regularly on the status of these projects to the School Committees.						

FUNCTION	RATING	COMMENTS	Spring 2011
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1 2 3 4 5
High Low

Please describe one accomplishment of the Superintendent during the preceding year that has particularly enhanced the school districts.

Please suggest one area for improvement by the Superintendent (either as a personal goal or a district-wide goal) in the upcoming year. Be specific about stating the problem and ways to measure progress toward improvement.

Evaluator _____ Date _____

ALG Minutes Jan.30, 2012—draft #3

Present: Bart Wendell, facilitator; Mike Gowing, Pam Harting-Barat, BoS; John Petersen, Xuan Kong, SC; Doug Tindal, Pat Clifford, FC; Steve Ledoux, Steve Mills, John Murray, Don Aicardi, staff. Audience: Janet Adachi, BoS; Mary Ann Ashton, Steve Noone, Clint Seward, FC; Bob Ingram, Allen Nitschelem, Charlie Kadlec, AVG.

Everyone complimented Don on the size 11X 17 of ALG sheet.

Minutes were accepted.

Review of FY13 plan

Don started on a listing of the changes from the last ALG session: the biggest is the change in the revenue numbers for the state House I (II). Don put in the exact numbers. He also added an OPEB sheet & the cherry sheet numbers appeared on pg.2

Bart asked if this was the time to start on the discussion of the assumptions—or what a consensus meant for the group as a whole

Pat C wanted to know if there had been any “guidance” on the levels of Acton’s Ch 70---the reduction in the number of students.

Ans. Don did not think there would be any dramatic change & went with the best numbers at this time.

Bart: There are three points where we need consensus: revenue assumptions; reserve use & expense allocation. Some people feel that consensus is the only way to go while others do not---we frequently view the alternatives as worse--meaning going to Town Meeting without a consensus. Bart polled the members

Mike: There is a difference of opinion but we should strive to present a united front;

John P: Not deeply concerned how we appear-we need a spirited debate it needs to be completely clear to every person in town the impacts on the school budget. But the schools cannot be an island---we have common ideas that are connected & we should go forward in concert;

Doug T consensus is preferable---that is the reason for the ALG to make decisions on what’s important. Our (FC) concern isn’t so much this year, but with the next few years. We think that it would not be wise to spend at this level and to ignore what’s happening [to the reserves] there is a lot at stake. If we sustain the spending at this level without new revenue sources, we’d be headed for a \$18 M shortfall which would be equivalent to a 20% increase in taxes;

Pam: we have the schools vs. town vs. fin com.---I do not want to go back to those days. We need to present a united front. We also have the problem of OPEB---no one understands it so it will be ignored or voted down;

Pat C. we may not feel the pain now but we will by the third night of Town Meeting when we are still squabbling; Xuan—I understand what Doug has said I think it is desirable to reach consensus but we see things differently and need to strike a balance. It is the service we need to supply. It is better to reach a consensus.;

Steve L: I have been to more Town Meetings than most and it is imperative to have a consensus---we do not want a food fight at Town meeting;

Steve M: I agree with what’s been said. I liked the straw man document from the last ALG. It is not my call on how Town Meeting spends money but I think we have an investment budget that is modest. I can see that the \$18M is to

fall off a cliff but I think the ALG sheet is conservative and we need to be a bit more optimistic---I think some of the numbers on the spreadsheet will get better.

Bart: so now we have a food fight---we have a range from being terrible to going into Town Meeting without a consensus and that it will be good to have the argument...this will make consensus more difficult. We have not discussed revenue assumptions, revenue use and expenditure---there is a penalty---the time line is getting closer. Do we need another meeting?

JP: last time the FC was the odd man out but the FC has presented the time line

Doug: The FC has a meeting on Feb 7th---where we will be able to comment. I'm not sure that the FC doesn't consider themselves as the odd man out. While we are not elected, we are nonetheless obliged to serve as advisors to the Town Meeting on the status of the town's finances. As such we must tell them what we think. The FC voted unanimously for the revenue use of \$1.5 M and we don't see any reason to change that recommendation. As for the coming years, we see upcoming deficits which would nearly exceed our maximum ability to raise revenue, so it makes sense that we would recommend that we have to be tough on expenses. We have to consider structural changes to head off what we see coming. If we see things that way, then we are obliged to say that at TM

Don: is the \$1.5 M inclusive of the \$200k?

Doug: things can be adjusted

Don: on the spreadsheet we have Ed Jobs that can only be spent on the schools---is that in the \$1.5M?

Pat C: we already have tax to the max, HIT under pricing by 4% on top of our \$1.5M on top of \$1M imbedded in revenue that's been left alone

Doug: Ed Jobs is a one-time event

JP: took exception with some of the numbers on the spread sheet noting that they were not what was in fact spent and that others, to him looked "incorrect"

JM: we appropriated \$3.2 M turned back & created free cash---netted @ \$41M therefore net use was \$100k---in the last couple of years we have turned back significant monies

Doug: that is a focus on one year---one time revenues for one year---the solution to the deficits is in reducing ongoing expenses.

Bart: \$3.1M difference for FY 11---does that translate into the differences for the future?

Pat C. Unfortunately we look at revenues in a rearview mirror---we cannot appropriate from turnbacks---we cannot recapture the money in the equation

Mike: Prop 2.5 puts us on a glide path ---the revenue will never be able to sustain operations that's why we need to go back to the voters for overrides

Doug: I agree but the glide path is far steeper than we realize

Xuan: FY 14 & 15 are projections---we need a better picture for the use of reserves for the next years. We have held back on school spending for the past three years. This is not a path the schools should take we have services we need to give to the kids.

Bart: What's next? Given the position of Doug?

JP: What matters is net use –budgets are a tool. I just think the summation of it is just not right

Bart: is the degree of error large enough....

JP: The Segal report projections for 2011/2010 in 2008 they said it would be \$1M and 2010 \$967k---in fact it went down \$200k that's a 20% error. The drivers are super important and that's compensation

Bart: does anyone else want to get involved?

Pam: the town has never faced anything like OPEB before---it needs to be addressed

Pat C. It seems to me we are \$1M apart---it seems an amount we can turn over to Steve & Steve to sort out. She suggested that the fin com would be willing to come off its maximum reserve use by \$200k provided that the town and schools agree to expense reductions which would eliminate the remainder of the shortfall.

Steve L: the straw man shows an HIT savings that can be used to reduce reserves or OPEB in FY 13---there is \$486K savings; @\$ 394k from AB---the \$800k could come from reserves

Bart asked how people wanted to proceed.

Some felt that the \$3M problem was reduced to \$800k, others felt that the savings from HIT could do the trick

However Doug stated that these were not solutions to the long-term budget problem which at its current rate of spending was not sustainable. He noted that it would be far less painful now if the problems were faced sooner than later---he asked for "real cuts" ---expense reductions in budgets that the FC feels are not sustainable for the future health of the town.

Xuan reiterated his statement that the budget cuts being asked would not allow the schools to deliver the services that were needed.

Mike noted that the managers—Steve & Steve should be given the chance to come to an agreement to find the cuts and come back

JP reiterated his position that the projections made in the former years were still being used in a plan even though these projections were shown to be off the mark.

Bart asked if there was agreement to have Steve L & Steve M look at the budgets& come back. He also added the \$200k for additional reserve use.

That additional money which Doug said could be in the table ONLY if there were cuts---not one-time expenses—in the budgets. There was a bit of discussion as to exactly how & when the FC would agree to the additional sum. Doug was adamant that there needed to be meaningful cuts.

It was agreed that another meeting was necessary. All would take the discussion back to their respective boards

Steve L would do an email poll of a suitable time.

Public:

Allen N asked for the exact obligations set out in the Segal report. He was not happy that none of the staff could give him a satisfactory answer.

Mr. Kadlec noted that the FY 11 reserve use was lower than shown in the spreadsheet& the 2nd half of the expenses were lower. He stated that it was his long –standing position that the actuals be added to the sheet

Adjourned 6:45

Ann Chang

ALG Minutes Feb. 16, 2012 #3

Present: Bart Wendell, facilitator; Mike Gowing, Pam Harting-Barrat, BoS; Doug Tindal, Pat Clifford, FC; John Petersen, Xuan Kong, SC; Steve Ledoux, Steve Mills, John Murray & Don Aicardi, staff.

Audience: Mary Ann Ashton, Clint Seward, FC; Marie Altieri, school staff; Allen Nitschelem, Charlie Kadlec & Dick Calendrella, AVG

The Minutes were accepted

2. Review if FY 13 plan---incorporating the Town Manager's and school superintendent's budget reductions
Included was the need to reach consensus on 1. Revenue Assumptions; 2. Reserve use; & 3. Expense allocation.

Doug wished to make sure that a multi-year plan was also discussed to prepare for the presentation at Town Meeting.

Bart agreed that should be a part of the discussion. Bart was "pleased" to hear that the groups seemed to have reached a consensus on the three points.

Steve L: explained that the \$2.9+ M use of reserves has been lowered to \$1.7 M in keeping with the increase of \$200k to the original \$1.5M level allowed by the FC. \$700k came from HIT & was taken "off the top" changes were made in transportation. In the second meeting they agreed to the 70/30 split. The "Tiger Team" worked on the nursing dropping the \$400k to \$200k. The schools are looking at their own cuts.

Doug congratulated them on their efforts and said he'd work with FC to sign off on the \$1.7M as opposed to the original \$1.5M. He noted that some of the projected negative balance of \$13M for FY13, 14 & 15 as shown in the Jan spreadsheet has been reduced in the new Feb 15 spreadsheet to less than \$9M before OPEB & he praised the ALG process.

Bart asked if the three assumptions were now settled and consensus reached. They have.

Pat: agreed that the consensus had been reached for FY 13. She asked about the level of the overlay fund.

That information is not yet available.

Bart: historically the ALG has focused on the upcoming year---the other years would flow into place but not be a focus in part because the documentation was not available.

J.P looking at FY 12 he wondered about the mild winter and the use of reserves. He thought the numbers might be different from what is on the sheets

J.M. said there was a definition problem between net use and appropriated monies---the ALG was preparing a document that would go to Town Meeting

J.P: A projection exercise might be interesting to go back & see how well the ALG did Two years of actuals might be useful

J.M: FY 11 & 12 net out to "0" & we only present FY 13---it is a matter of how we use the report & present it to Town Meeting. This is done on what TM voted for appropriations.

Xuan: there are two issues: going to TM on what we know is a gap between planned expenses; and anticipated revenue (thus the need to appropriate reserve use to fill the gap) and what is the net change of our reserves which is the combined effect of the actual expenses, revenue and replenishment of reserves at the end of the fiscal year.

Bart: do we change the use to appropriation ---line F on 1st page?

Doug: Actuals to budget is fundamental to FC support. The reserves as we in the leadership understand them & as understood by the public are not the same thing. It would be a good exercise to publish an agreement on what we see as reserves. NESWC is a stabilization fund & not a reserve.

Bart: do you want to change this now or when?

There was an agreement between Doug & JP that this information would be valuable. JM reminded them that the info was tied to the recap sheet and that did not do the current year. It was suggested that the information on reserves be released around the time of the recap sheet is accepted

***There was a consensus to change the use of appropriated monies [it was not clear as to who would do the task]

Bart asked if there was anything else to be discussed

Doug: the FC wants to talk about FY 14 & 15 & how we will model the info for the future years.

Bart cautioned that decisions made by one ALG do not restrict the next year

There was a general discussion about the OPEB & how it would be funded. It appears that number will be part of the 70/30 split even though there was a hope that it would come from reserves. There was also the general feeling that the state would intervene into the OPEB issue and have "directions" to towns as to how they would fund the liability and by how much. Under the split AB would fund \$216K. There was a caution that if the regionalization were to pass the AB portion would increase. There was recognition that some citizens wanted to make the payment far greater based on the liability and the Segal report.

JM suggested that the OPEB contribution from the municipal and regional entities should be proportioned according to the liabilities.

J.P the UUAL for the municipality is \$57.3M and the UUAL for the ABRD is \$43.6M as of Dec. 2010. On this basis the \$500k would be split as $500 \times 43. (43.6 + 57.3) = \$216k$ for the regional OPEB and \$284k for the town.

Under the split AB would fund \$216K. There was a caution that if regionalization were to pass the AB portion would increase.

There was recognition that some citizens wanted to make the payment far larger based on the liability and the Segal report.

Doug noted that the FC realized the \$500k was not significant number in light of the liability. But the FC thought it was a prudent move to make a start and at the same time educate the public about the liability

Pat C: handed out a "green sheet" where the FC has increased the money for the OPEB every year...\$500k, \$750k It was posited that the increase could be funded by the savings in HIT.

There was agreement that the OPEB should increase in the future years---the amount could not be determined. There were propositions to increase by \$100k; 50%; a "decent amount"

Steve L: said that this whole discussion would likely be moot since it appeared that within the next two years the State would tell the towns how much they had to add to their OPEB funds. He felt that it was good to start and show

that there was an inclination to increase the amount to show a "good faith" effort. It was good to get in front of the problem

J.P said the last time Acton got in front, they went to Concord & got shot.

JM noted that the MMA has cited OPEB as their big issue and he does not think it will be another "kick the can ahead issue" but will become some sort of legislation for next year.

Pat C. reminded them that as ALG they were supposed to be the leaders—"I'd rather go to Town meeting with some number and admit what is coming than come back later & tell the Meeting that we knew but did nothing"

Bart: are we talking about alternatives for the warrant? The FC will go in with their numbers which will not be supported by the SC? Does it matter if they do not agree?

Xuan: I don't think anyone here is trying to minimize the problem. I think we need to take these numbers [the green sheet] back to our respective boards for further analysis. We may find that there are more reasonable assumptions for FY 14 & 15

Bart: we now have OPEB at \$500k/\$750k--- green sheet number; \$750k/\$1.125M—Mike's proposal; \$600k & \$700k—JP's proposal. Shall we do what Xuan recommends & take these back to the boards?

Doug: we are all saying that the number has to go up to the \$2.2M We have put our thumb on the scale & taken a middle of the road process.

*** Since the green sheet has not been vetted, it was agreed that it be taken back to board & committees

Public:

Allen: The FC is doing a disservice to the community with the \$500k number. A prudent amount would be \$2M. We have Segal report suggesting a need for \$10M. The \$500k is totally inadequate. We will see that in a few years.

Charlie: there are a number of articles: two for collective bargaining and two for capital equipment---are the sums to fund these on the spreadsheet? ANS: yes.

Don noted that the numbers on the sheet had been scrubbed but putting on [scrubbed] out years might take some time.

Next meeting is Feb 28th

It appeared that no one seemed to think that was enough time to get "meaningful" numbers for the out years. There was a general discussion about the scheduling of meetings when the various boards would have a chance to look at the green sheet. Both the BoS & SC have full agendas and cannot promise that they will have the chance to discuss & vote on the numbers.

There was a suggestion that the meeting on the 28th be skipped---that was shot down.

****It was agreed to meet & go with what was available [Don & John will do some scrubbing?] because there are other things to discuss

****It was also agreed to have a post Town Meeting session to look into developing long range plans

Adjourned 7 PM

Ann Chang

Next Meeting Feb 28th 5PM.

Memo

To: Acton Health Insurance Trust
From: John Petersen
CC: Steve Mills, Don Aicardi, M. Altieri, Steve Ledoux, M. Fleckner, P. Savage
Date: February 23, 2012
Subject: Guidance for Acton Health Insurance Trust HMO Premiums FY13

Summary

The purpose of this document is to summarize information relevant to rate setting for the HMO plans – NetBlue and HPHC HMO – offered by the Acton HIT for FY13. These HMO plans are expected to represent more than 95% of the contracts insured by the Trust in FY13. The HMO guidance is based on the HMO experience from FY09-FY12 disaggregated from the other insurance plans offered by the Trust.

Introduction

The two HMO plans, NetBlue and HPHC HMO, are considered very similar by the trustees and in some recent years have been offered at the same rates. In this analysis, the actual expenses of each plan and subscribers to each plan are used to retrospectively calculate break-even insurance rates based on an expected relative cost of family plans to individual plans of 2.4:1. The plans are analyzed on a cash flow basis (Cook & Co. data from P. Savage) as the annual audit does not provide both expense information and subscriber information by plan.

HMO Subscription Changes FY09-FY12

The number of subscribers in each plan by type of subscription (family or individual) is shown in Table 1. While HPHC had more subscribers and was a larger expense in FY09, today NetBlue is the Acton HIT's largest plan. Note that this has occurred because of increasing subscription to NetBlue (about a 40% increase in families and a 20% increase in individuals) while enrollment in HPHC was relatively constant. For the purpose of the analysis that follows, it is assumed that the total number of HMO subscribers is the same in FY13 and FY12.

Table 1. HMO Subscription* changes FY09 to FY12

	NetBlue		HPHC HMO		NetBlue+HPHC	
Year	Family	Individ.	Family	Individ.	Family	Individ.
FY09	202.3	134.9	264	98.8	466.3	233.7
FY10	214	138	259	99	473	237
FY11	240.8	154.5	259.3	107.7	500.1	262.2
FY12	284	162	253	93	537	255

*average number of subscribers during the year from year-end cash flow statements

The actual expense for the summed HMO's is shown in Table 2 and the average cost per subscriber index, **ASCI**, (based on family cost 2.4x individual cost) is calculated. The ASCI trend is shown in Figure

1 and includes the projected expense for FY13. The appendix shows that the expense trend is the result of a more favorable experience for HPHC and a less favorable experience for NetBlue. The observed divergence in the rate of expense increase between the two plans is consistent with higher cost subscribers moving from the indemnity plans (MHP and BCE) and bringing their higher costs to the Blue Cross HMO. Nonetheless, the rate of increase in HMO costs has been moderate over the period of interest.

Table 2. HMO Expense (Cash flow basis) Growth; Summed for NetBlue and HPHC

Year	NetBlue+HPHC			Contracts NetBlue+HPHC		Monthly Retrospective Rates	
	Expenses	ACSI ¹	% incr.	Family	Individ.	Family ¹	Individ.
FY09	\$ 8,588,717	\$6,349		466.3	233.7	\$1,270	\$529
FY10	\$ 9,285,428	\$6,767	6.6%	473	237	\$1,353	\$564
FY11	\$ 10,179,012	\$6,960	2.9%	500.1	262.2	\$1,392	\$580
FY12 ²	\$ 11,595,029	\$7,511	7.9%	537	255	\$1,502	\$626
FY13 ³	\$ 12,265,689	\$7,945	5.8%	537	255	\$1,589	\$662

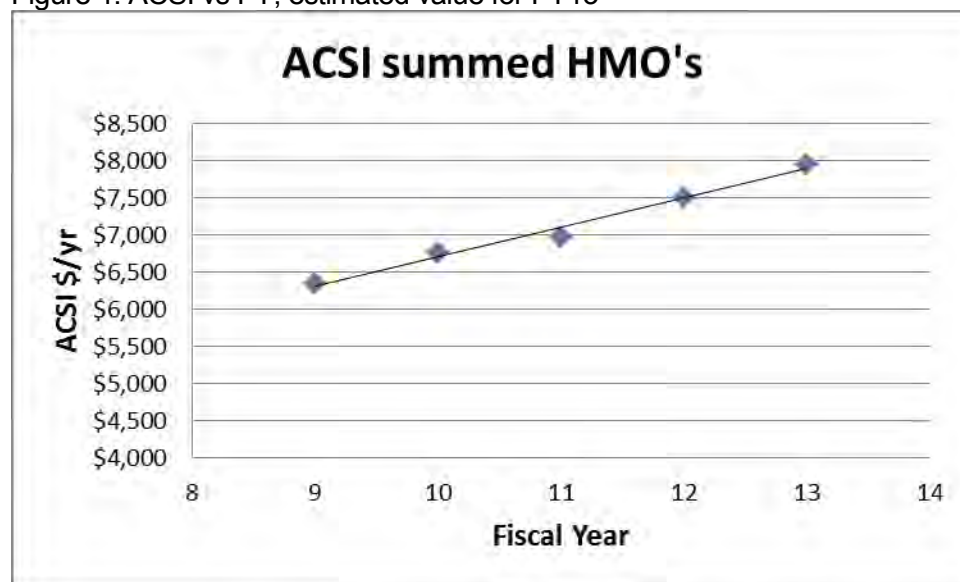
¹ Assumes that family contract is 2.4*individual contract,

Annual ASCI values for FY09 are \$6349 for individual; \$15,238 family (\$15,238 = \$6349*2.4)

² Projected from 9 months of FY12, includes expected reinsurance payments in Q4

³ Assumes FY13 increase is average of previous 3 years, no changes to plan design

Figure 1. ACSI vs FY, estimated value for FY13



According to Table 2, the breakeven rate for FY13 assuming that expenses increase per the average of the past three years, 5.8%, is \$1589 for the family plan and \$662 for the individual plan (monthly rates, assuming that a change in family/individual rate ratio is desired).

Decrements associated with plan design changes are provided in the Cook & Co worksheets (P. Savage email 2/15/12) and are shown in table 3. The change in plan design is projected to have the same effect on both NetBlue and HPHC HMO. The change is projected to reduce costs by 6.5% for both HMO Blue and HPHC. The change is projected to reduce costs for MHP slightly less, 5.3%.

Table 3. Decrements for Plan Design Changes, Ratio of Family/Individual premium (Cook & Co)

		MHP	HMO Blue	HPHC
Savage Old Plan Design FY13	Family	3323.32	1675.96	1675.96
	Individual	1418.22	709.28	709.28
Savage New Plan Design FY13	Family	3157.15	1573.73	1573.73
	Individual	1347.31	666.01	666.01
% Decrement for New Plan	Fam & Ind	5.26%	6.50%	6.50%
Ratio	Family/Indiv	2.343	2.363	2.363

Using the break even rates from Table 2 and the plan design change decrement (rounded to an even 6%) from Table 3, FY13 break even rates with and without plan design changes are shown in Table 4.

Table 4. Comparison of Projected rates to FY12 actual rates with and without plan design change

No Plan Design Change			
	FY12	FY13	increase
Family	\$ 1,524	\$ 1,589	4.3%
Individual	\$ 645	\$ 662	2.7%
ratio fam/ind	2.36	2.40	
Plan Design Change			
	FY12	FY13	increase
Family	\$ 1,524	\$ 1,494	-2.0%
Individual	\$ 645	\$ 622	-3.5%
ratio fam/ind	2.36	2.40	

Balance of the Acton Health Insurance Trust

The trustees have stipulated that the projected loss for FY12 be \$400K for the purpose of rate setting. If this assumption is correct, the unrestricted trust balance will be \$3.2M or approximately 22% of expenses. On the basis of the balance alone, the bias of the trustees should be neutral to negative (rates set to break even or lose money).

Recommendation

The calculations above are predicated on the assumption that a rolling average over multiple years is the best mechanism to buffer the rate setting process against excessive year to year variation. I continue to believe that this is the best approach. The calculations also assume that the cost of care via BCBS or HPHC is approximately the same. Given these assumptions, I recommend that for FY13 with the new plan designs, HMO monthly rates for families and individuals be set at \$1494 and \$622 respectively.

Appendix A: Costs for Individual HMOs, Acton NetBlue and HPHC HMO

Table 5. HMO Expense Growth NetBlue

Year	Expenses	ACSI ¹	% incr.	Contracts	
				Family	Individ.
FY09	\$ 3,667,342	\$5,911		202.3	134.9
FY10	\$ 4,342,702	\$6,665	12.7%	214	138
FY11	\$ 5,215,846	\$7,121	6.9%	240.8	154.5
FY12 ²	\$ 6,524,843	\$7,735	8.6%	284	162
FY12	\$ 6,683,857	March Cash Flow			
reimburse	\$ (159,014)	PS email 2/16/12			

¹ Assumes that family contract is 2.4*individual contract

² Projected from 9 months of FY12, includes expected reinsurance payments in Q4

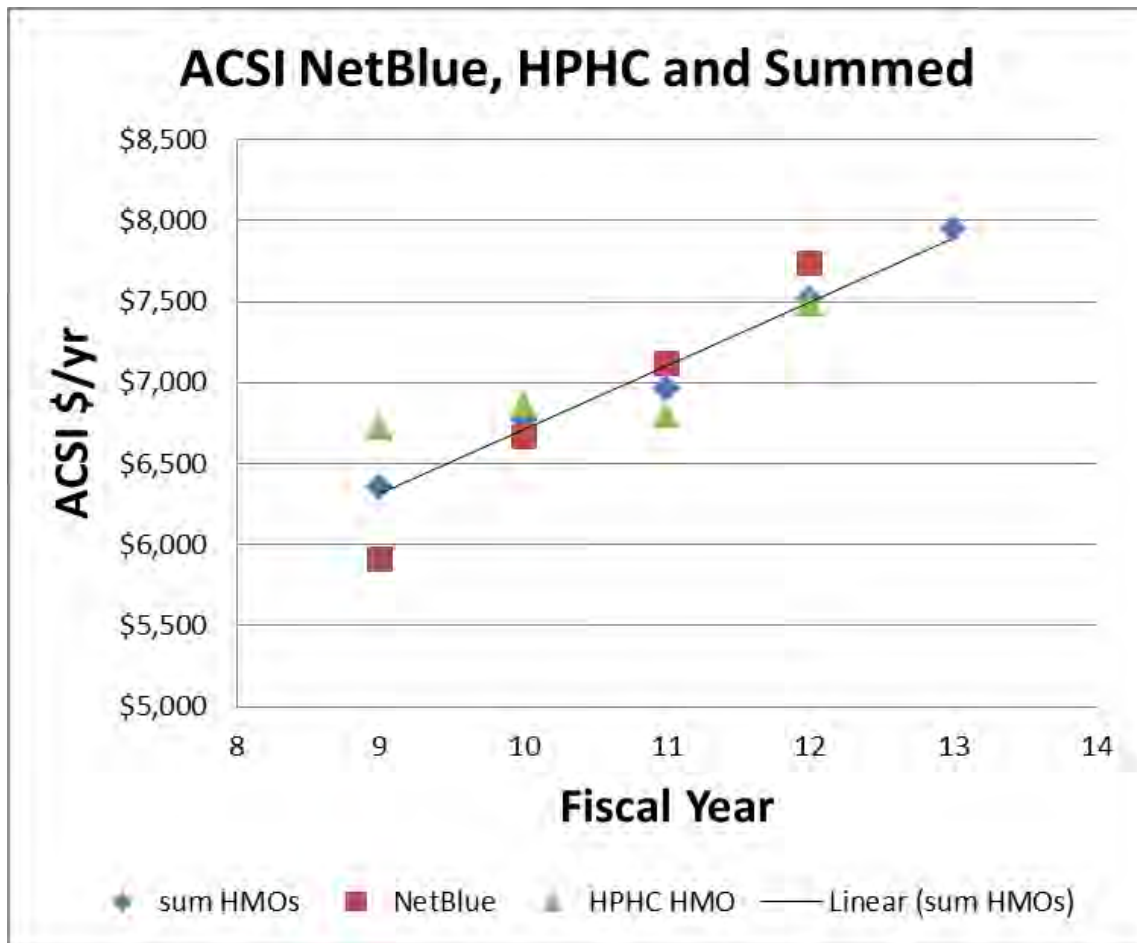
Table 6. HMO Expense Growth HPHC

Year	Expenses	ACSI	% incr.	Contracts	
				Family	Individ.
FY09	\$ 4,921,375	\$6,720		264	98.8
FY10	\$ 4,942,726	\$6,859	2.1%	259	99
FY11	\$ 4,963,166	\$6,799	-0.9%	259.3	107.7
FY12 ²	\$ 5,070,185	\$7,486	10.1%	253	93
FY12 mar	\$ 5,241,667	March Cash Flow			
reimburse	\$ (171,482)	PS email 2/16/12			

¹ Assumes that family contract is 2.4*individual contract

² Projected from 9 months of FY12, includes expected reinsurance payments in Q4

Appendix B: Figure ASCI vs time for Individual and Summed HMOs



Acton Health Insurance Trust Report – Rate Setting February 2012

John Petersen

The Trust met on February 16th and 24th, 2012 for the purpose of setting insurance premium rates for FY13. An updated cash flow was presented (projecting FY12 loss of \$292K; \$622K shown on cash flow spreadsheet minus \$330K HMO reinsurance payments not shown in the cash flow). The projected loss for the indemnity plans (MHP and BCE) is \$420K, the HMOs are projected to run a small surplus.

At the meeting on February 16th, the trustees generally discussed issues involved in rate setting. Renewal worksheets prepared by Mr. Savage for each plan were reviewed. The renewal calculations were based on health care inflation parameters from BC and HPHC and the last 18 months of experience. The number of subscribers in MHP and BCE is so small that no credible rate estimation can be derived from the Acton HIT experience information.

For the purpose of rate setting, the trustees assumed:

- Health care inflation will be 6% for FY13 (blended rate for medical, pharmacy & operations)
- Reinsurance parameters and costs will not change in FY13
- Operating loss for FY12 will be \$400K

Given the short amount of time the trustees had to review the proposals from Mr. Savage, the trustees decided to hold a second meeting on Feb 24th to actually set rates.

On February 24th, the trustees reviewed revised rate proposals for each plan from Mr. Savage, global requirements of rate setting as estimated by Mr. Evans and a proposed monthly rate for the HMO's prepared by Mr. Petersen (see Petersen to HIT, "Guidance for Acton Health Insurance Trust HMO Premiums FY13" 2/23/12). The trustees again discussed the issues of health care inflation, maintenance of a healthy unrestricted asset balance and the projected impact of health care plan design on FY13 expenses.

Mr. Petersen moved that the rates for the HMO's be set according to his memorandum at \$1494/month for family subscribers and \$622/month for individual subscribers. The same rate would apply to NetBlue and HPHC HMO and be a reduction of approximately 2.5% from FY12 rates (see table 1 HMO rates below and in Mr. Petersen's memo). Mr. Gowing suggested amending the motion for HMO rates to reduce them an additional 1% to better reflect the accomplishments of the working group plan design change. The trustees agreed that the rate ratio family/individual be set at 2.4 which is the pooled actuarial experience of Blue Cross and Harvard Pilgrim. For FY13 the rates for HMO plans were voted to be \$1479/month for families and \$616/month for individuals as suggested by Mr. Gowing which is approximately a 3.5% reduction from FY12. As noted above, the number of

subscribers in MHP and BCE is too small to use claims experience as the sole basis of rate setting. For FY13, the rates for MHP were slightly reduced and for BCE slightly increased. The rate ratio family/individual was again set to 2.4 (see table indemnity plans). Both plans are projected to experience significant losses in FY12. Medex rates were left unchanged, at \$383/month. Following the meeting, Mr. Savage projected the FY13 revenues of the trust from subscriber premiums will be \$13.9 million; \$9.7 million (70%) contributed by employers and \$4.2 million (30%) contributed by employees (all plans, active and retired employees). The next meeting of the trust will be held in April.

Table 1. **HMO Rates** from Petersen memo, impact of plan design

	HMOs No Plan Design Changes		
	FY12	FY13	increase
Family	\$ 1,524	\$ 1,589	4.3%
Individual	\$ 645	\$ 662	2.7%
ratio fam/ind	2.36	2.40	
	HMOs with Plan Design Changes		-6%
	FY12	FY13	increase
Family	\$ 1,524	\$ 1,494	-2.0%
Individual	\$ 645	\$ 622	-3.5%
ratio fam/ind	2.36	2.40	

Table 2. **Indemnity Plan Rates; FY12 & FY13 Health Insurance Rates**

	Master Health Plus		
	FY12	FY13	increase
Family	\$ 3,021	\$ 3,017	-0.1%
Individual	\$ 1,290	\$ 1,257	-2.5%
ratio fam/ind	2.34	2.40	
	Blue Care Elect PPO		
	FY12	FY13	increase
Family	\$ 2,543	\$ 2,614	2.8%
Individual	\$ 1,082	\$ 1,089	0.6%
ratio fam/ind	2.35	2.40	

**MEMORANDUM OF AGREEMENT
BETWEEN
THE TOWN OF ACTON, ACTON PUBLIC SCHOOL COMMITTEE AND
ACTON BOXBOROUGH REGIONAL SCHOOL DISTRICT
AND
TOWN OF ACTON EMPLOYEE UNIONS AND ACTON BOXBOROUGH
REGIONAL SCHOOL DISTRICT EMPLOYEE UNIONS**

WHEREAS, the Town of Acton , Acton Public School Committee and the Acton Boxborough Regional School District (the "Employers") are public employers as defined in G.L. c.150E providing certain health insurance coverage to its subscribers (i.e., employees, retirees, surviving spouses and dependents); and

WHEREAS, all individual bargaining units(MassCops Local 380, Acton Police Patrol Officers Association, Acton Permanent Firefighters Local #1904, International Brotherhood of Teamsters Local 25, and AFSCME Council #93, Local 1703) of the Town of Acton and all bargaining units(Acton Education Association, Office Support Association and AFSCME Council #93, Local 1703) with members employed by the Acton Public School Committee and the Acton Boxborough Regional School District have nominated authorized representatives to meet and negotiate with representatives of the Employers, with respect to health insurance coverage; and

WHEREAS, the Employers and the authorized Union representatives (collectively, the "parties") have met and concluded negotiations regarding health insurance benefits for the Employers' subscribers for the three year time period from July 1, 2012 to June 30, 2015; and

WHEREAS, it is the express intent of the parties to create an enforceable, durable, binding agreement for the duration stated herein, subject to the conditions set forth herein.

WHEREAS, the parties agree that all current collective bargaining agreements, and any successor collective bargaining agreements negotiated between any of the

Employers and individual bargaining units shall continue in full force and effect, except as expressly modified by this MOA;

NOW, THEREFORE, the parties agree as follows:

1. Effective Date of Agreement:

The terms of this Agreement shall control the terms of health insurance as provided by the Employers to the subscribers referenced above. The Agreement shall be effective only upon ratification and approval by the all the bargaining units of its terms and approval by the Board of Selectmen for the Town of Acton, the Acton Public School Committee and the Acton Boxborough Regional School Committee. The Agreement shall be null and void and have no force and effect if all bargaining units and each employer fails to ratify the Agreement by February 10, 2012.

2. Authority to Negotiate and Amend Collective Bargaining Agreement:

The representatives of the individual bargaining units have been authorized by their respective units to represent and negotiate changes, additions, deletions and amendments to health insurance coverage in all aspects and to the extent that there is any inconsistency between the terms of this Agreement, concerning premium contribution split and co -pays, and any collective bargaining agreement the terms of this Agreement shall prevail and be deemed to be an amendment to the collective bargaining agreement. The parties agree any collective bargaining agreement negotiated after the effective date of this agreement covering the period through June 30, 2015 shall contain the premium contribution splits and co-pays set forth herein.

3. Premium Contribution Changes:

Effective July 1, 2012,

- i) All employees who subscribe to an indemnity plan or PPO plan shall contribute 50% of the cost of the monthly premium.

- ii) Employees who subscribe to an HMO shall contribute 25% of the cost of the monthly premium. To help offset the increased cost of the HMO (and except as provided in (iii) below), the Employers will provide a one time reimbursement each July for three years beginning in the year in which the increased monthly premium occurs according to the schedule below, for active employees who were enrolled in an Employer sponsored health plan on June 30, 2012 and who continue to be enrolled in an Employer sponsored health plan in July of the specified year. July 2012 or the first year of the increased premium: 10% of the actual cost of the plan in which the employee is enrolled. July 2013 or the second year of the increased premium: \$1200 for employees enrolled in a family plan /\$500 for employees enrolled in an individual plan. July 2014 or the third year of the increased premium: \$600 for employees enrolled in a family plan/\$300 for employees enrolled in an individual plan.
- iii) Employees of the Acton Boxborough Regional School District and Acton Public Schools having previously moved to the increased premiums provided under this Agreement and having negotiated separate benefits in mitigation of that change, such employees shall not be eligible for the mitigation benefits provided under this Agreement.

4. Plan Design Changes:

Effective July 1, 2012 the following plan design changes shall be implemented for all subscribers:

Office Visit Co-Pay \$20
Specialist Office Visit \$35
ER \$100
Hospital \$200
Day Surgery \$100
High Tech Imaging \$100 (CAT/CT/PET Scans)
Rx 10/25/40 for 30 Days
Rx \$20/\$50/\$80 for 90 Days

5. **Signatories:** All signatories hereby affirm that they are authorized to bind their principals and collective bargaining units.

IN WITNESS WHEREOF the parties have set their hands and seals this _____ day of _____, 2012.

BOARD OF SELECTMEN
Town of Acton

TOWN OF ACTON
EMPLOYEE UNIONS:

Thomas Rogers
Mass Cops Local 380

Chris Prehl
Acton Police Patrol Officers Association

TOWN MANAGER

Kevin Antonelli
IBT, Local 25

Steven L. Ledoux

Ken Carroll
Acton Permanent Firefighters, Local 1904

ACTON PUBLIC SCHOOL COMMITTEE

Dayle McGillvary
AFSCME Council #93, Local 1703

Marc Lewis
Acton Education Association

Ruth Cvitkovich
Office Support Association

Ty Payson
AFSCME, Council #93, Local 1703

ACTON-BOXBOROUGH REGIONAL
SCHOOL COMMITTEE

ACTON-BOXBOROUGH REGIONAL
SCHOOL DISTRICT UNIONS

Marc Lewis
Acton Education Association

Ruth Cvitkovich
Office Support Association

Ty Payson
AFSCME Council #93, Local 1703

6.12.1
(A)

Finance Office
Acton Public Schools
Acton-Boxborough Regional School District
(978) 264-4700 x 3206
<http://ab.mec.edu>

TO: Stephen Mills
FROM: Don Aicardi
DATE: 2/28/12
RE: Language for Acton-Boxborough Regional School Committee votes on Other
Post-Employee Benefits Liability Trust Fund

Attorney Peter Ebb has provided the following draft language for the School Committee to use at their meeting on 3/1/12 when considering the establishment of an Other Post-Employment Benefits (OPEB) Liability Trust Fund.

DRAFT OPEB MOTIONS

1. Move that the Regional School District Committee accept the provisions of Section 20 of Chapter 32B of the Massachusetts General Laws providing for the establishment of an Other Post-Employment Benefits Liability Trust Fund.
2. Move that an Other Post-Employment Benefits Liability Trust Fund be established as a segregated fund on the books of the District and administered in accordance with the requirements of and for the purposes of Section 20 of Chapter 32B, such fund to be in the form of an irrevocable trust or such other form as shall be determined by counsel as appropriate to meet the requirements of Section 20 and of Government Accounting Standards Board standard 45.

Chapter 32B: Section 20. Other Post-Employment Benefits Liability Trust Fund

[Text of section as amended by 2011, 68, Sec. 57 effective July 1, 2011. See 2011, 68, Sec. 221.]

Section 20. (a) A city, town, district, county or municipal lighting plant that accepts this section may establish an Other Post-Employment Benefits Liability Trust Fund, and may appropriate amounts to be credited to the fund. Any interest or other income generated by the fund shall be added to and become part of the fund. Amounts that a governmental unit receives as a sponsor of a qualified retiree prescription drug plan under 42 U.S.C. section 1395w-132 may be added to and become part of the fund. All monies held in the fund shall be segregated from other funds and shall not be subject to the claims of any general creditor of the city, town, district, county or municipal lighting plant.

(b) The custodian of the fund shall be (i) a designee appointed by the board of a municipal lighting plant; (ii) the treasurer of any other governmental unit; or (iii) if designated by the city, town, district, county or municipal lighting plant in the same manner as acceptance prescribed in this section, the Health Care Security Trust board of trustees established in section 4 of chapter 29D, provided that the board of trustees accepts the designation. The custodian may employ an outside custodial service to hold the monies in the fund. Monies in the fund shall be invested and reinvested by the custodian consistent with the prudent investor rule established in chapter 203C and may, with the approval of the Health Care Security Trust board of trustees, be invested in the State Retiree Benefits Trust Fund established in section 24 of chapter 32A.

(c) This section may be accepted in a city having a Plan D or Plan E charter, by vote of the city council; in any other city, by vote of the city council and approval of the mayor; in a town, by vote of the town at a town meeting; in a district, by vote of the governing board; in a municipal lighting plant, by vote of the board; and in a county, by vote of the county commissioners.

(d) Every city, town, district, county and municipal lighting plant shall annually submit to the public employee retirement administration commission, on or before December 31, a summary of its other post-employment benefits cost and obligations and all related information required under Government Accounting Standards Board standard 45, in this subsection called "GASB 45", covering the last fiscal or calendar year for which this information is available. On or before June 30 of the following year, the public employee retirement administration commission shall notify any entity submitting this summary of any concerns that the commission may have or any areas in which the summary does not conform to the requirements of GASB 45 or other standards that the commission may establish. The public employee retirement administration commission shall file a summary report of the information received under this subsection with the chairs of the house and senate committees on ways and means, the secretary of administration and finance and the board of trustees of the Health Care Security Trust.

Acton-Boxborough Regional School District

Other Post-Employment Benefits (OPEB)
March 1, 2012

OPEB for ABRSD

- The Acton-Boxborough Regional School District is a separate legal entity and is responsible for payment of a portion of ABRSD retiree health insurance.
- ABRSD has been meeting this responsibility with a “pay-as-you-go” system.

OPEB for ABRSD

Tonight: ABRSD may elect to establish an OPEB trust fund.

This trust fund would, in time, augment our current “pay-as-you-go” system.

Funding to make the first installment into this ABRSD trust fund is included within the FY'13 budget.

OPEB for ABRSD

Why create an OPEB fund?

- An OPEB trust fund could be used to stabilize retiree health insurance payments as a percentage of the ABRSD budget.
- Put another way: funds we begin to place in the ABRSD trust will be used when the retiree health insurance costs start to have a heavier budgetary impact on our future budgets.

OPEB for ABRSD

Model payment projection – Segal 2011 data

*assumes 3% annual budget growth, current “pay as you go” method

	AB	ABRSD	% of
FY	projected benefits	budget	budget
2011	\$967,205	\$ 38,228,410	2.53%
2012	\$1,119,128	\$ 39,375,262	2.84%
2013	\$1,296,016	\$ 40,556,520	3.20%
2014	\$1,465,056	\$ 41,773,216	3.51%
2015	\$1,640,747	\$ 43,026,412	3.81%
2016	\$1,800,178	\$ 44,317,205	4.06%
2017	\$1,974,128	\$ 45,646,721	4.32%
2018	\$2,127,363	\$ 47,016,122	4.52%
2019	\$2,244,466	\$ 48,426,606	4.63%
2020	\$2,373,055	\$ 49,879,404	4.76%
2021	\$2,506,722	\$ 51,375,786	4.88%

OPEB for ABRSD

How much should we budget?

- \$300K/year: Assumption used in model presented to ABRSC 2/2/12.
- \$236K recommendation for FY'13 budget for SC consideration tonight.

OPEB for ABRSD

Current FY'13 recommendation: \$236,000

Acton share (@ 80.67%) equals	\$190,381
Boxborough share (@19.33%) equals	<u>\$45,619</u>
	\$236,000

My recommendation would be to show annual OPEB trust allocation as part of Table 6 due to it's importance and to show both communities very plainly their share of the contribution.

OPEB for ABRSD

ABRSD UUAL (OPEB liability) is \$43.6 million,

ABRSD-Acton share is $80\% * \$43.6 \text{ million} = \34.88 million

ABRSD-Boxborough share is $20\% * \$43.6 \text{ million} = \8.72 million

Each municipality and regional school district In Massachusetts is grappling when to establish and/or how much to place in their trusts

For example, Acton has set a goal of \$500,000 this fiscal year towards its' OPEB liabilities-\$190,381 of that goal is in the ABRSD FY'13 budget

OPEB for ABRSD

OPEB FAQs

OPEB for ABRSD

How would an OPEB trust work in conjunction with the DOR's 5% cap?

- We have confirmed with the DOR that any funds that are placed in an OPEB fund would not count toward the 5% cap because they would be considered to be separate.

OPEB for ABRSD

What does the RSD have to do to create the OPEB fund?

- The RSD must accept M.G.L. Chapter 32B Section 20 to establish an OPEB fund. The vote to accept will be a majority vote, as calculated under the voting rules in the Regional Agreement.

When can the RSC vote to create the fund?

- At any time. The statute does not provide for specific timing. Once the Committee accepts M.G.L. Chapter 32B Section 20, it can then create the fund by a vote of the Committee.

OPEB for ABRSD

How does ABRSD transfer money to the trust?

M.G.L. Chapter 32B Section 20 does not provide a specific mechanism for funding the trust. There are three possibilities:

1. Annual regional budget process
2. Fiscal Year end transfers (while looking at the relationship to E & D 5% cap)
3. Vote from E & D (once DOR certified).

How does ABRSD spend money in the trust?

The statute does not deal with this issue. GASB 45 says that monies held in an OPEB fund should only be used for the purpose of paying benefits to retirees or their beneficiaries, but does not specify the manner in which the payments are to be made.

OPEB for ABRSD

Once reserved, can the OPEB Trust Fund be used for anything else?

No. Once the fund is set up as an irrevocable trust and funds are disbursed into this separate account, they cannot be used except to pay the retiree health care costs for which the fund was created.

OPEB for ABRSD

MOTION #1:

Move that the Acton-Boxborough Regional School District accept the provisions of Section 20 of Chapter 32B of the Massachusetts General Laws providing for the establishment of an Other Post-Employment Benefits Liability Trust Fund.

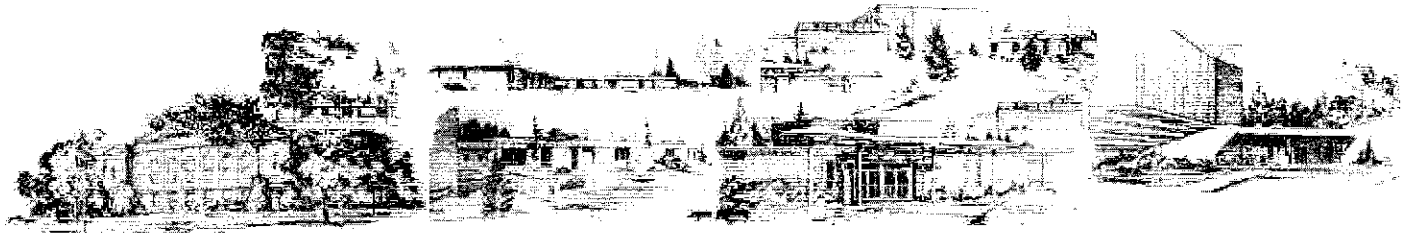
OPEB for ABRSD

MOTION #2:

Move that an Other Post-Employment Benefits Liability Trust Fund be established as a segregated fund on the books of the Acton-Boxborough Regional School District and be administered in accordance with the requirements of and for the purposes of Section 20 of Chapter 32B, such fund to be in the form of an irrevocable trust or such other form as shall be determined by counsel as appropriate to meet the requirements of MGL Section 20 and of Government Accounting Standards Board Standard 45.

OPEB for ABRSD

Thank you.



Acton Public Schools • Acton-Boxborough Regional School District
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E-mail: daicardi@jwhit.ab.mec.edu

Donald Aicardi
Finance Director

TO: Superintendent Stephen Mills
FROM: Don Aicardi, Director of Finance *DA*
RE: FY12 Status Report-2nd Quarter
DATE: March 1, 2012

A. Summary

I am projecting that the Acton-Boxborough School District ended the second quarter of Fiscal Year 2012 with a \$251,405 projected year end fund balance.

B. Review of FY12 Budget-Highlights From First Quarter

I would like to highlight some of the most interesting observations for the regional school committee:

1. Salaries, Teaching. (\$-113k) The committee will recall that the current FY12 budget was deliberately constructed with significant reductions to account for retirements (-\$91k) and staff changes (-\$297k) which have had the intended effect of decreasing any potential vacancy factor savings before the beginning of the school year. The decision to anticipate these salary savings was done based on historical trends as well as a desire to make the FY12 budget increase as low as possible.

2. Salaries, Substitute (-\$50k) \$40,000 in additional vacancy factor savings were built into the FY12 budget within the teacher accounts which allowed us to increase the amount budgeted for substitutes from \$192,393 to \$252,793. This was intentionally done to more accurately reflect the amount of annual spending in this account. To date, this technique has closed this liability but has not erased it.

3. Health Insurance (+\$153k) The ABRSD FY12 health insurance was recalculated three times during last year's budget season to reflect evolving enrollment numbers, changes to the rate increases recommended by the Health Insurance Trust Committee, then to reflect the negotiated savings in the employer portion of health insurance. This estimate has continued to decrease due to enrollment changes since the first quarter.

4. Fringes, Unemployment (\$-26k) This account is still projected to be in deficit at year end. We have now built an internal tracking document which has improved the analysis of this account.

5. Fringes, Pensions (\$+14k) The Middlesex County Retirement Board has annually adopted an optional payment method which, if the annual appropriation is paid for in full by July 1, 2011, allows a 2% reduction in the appropriation to be realized. Due to our full payment, we were able to achieve cost savings in this account.

6. Other, Property/Casualty (+\$36k) Property and liability insurance expenses are charged both to this account and the Student Transportation account. This account was closely scrutinized with the help of J.D. Head, Director of Facilities and Transportation. We have concluded that there will be a small surplus at the close of the fiscal year.

C. Review of FY12 Budget-Highlights From Second Quarter

I would like to highlight some of the most interesting observations for the regional school committee:

1. Utilities (+\$98k) Due to our conservation efforts, our electricity usage continues to trend downward. Now, due to this unusually mild winter (so far!) we are now projecting a surplus caused by electricity and natural gas savings by the close of this fiscal year.

2. Other, Sped Tuition (+\$410k) Thanks to the state legislature, the final amount of circuit breaker reimbursement was confirmed in mid-September to be approximately 65%, higher than the estimate of 40% used in the FY12 budget last spring. We know that the final amount of reimbursement, if fully utilized this fiscal year, will be \$1,146,293, \$434,000 higher than the \$711k estimate used in the FY12 budget. Due to the complexity, I have been working closely with Liza Huber and her staff to closely monitor this account.

3. Other, Student Transportation (+\$51k) As mentioned during the FY13 budget meetings, the finalization of the Dee bus contract not only produced savings in the FY13 budget, but also in the FY12 budget.

4. Other, Maintenance Buildings (\$-281k) Although the details and timing of the Lower Fields project continue to develop, it is now reasonable to assume that if the project progresses through approval by the ABRSC and then both town meetings that construction expenses related to that project could impact the FY12 budget before June 30, 2012. In order to prepare for this eventuality, an assumption of construction expenses has now been included. If the project is not approved, this assumption of construction expenses will be removed by the third quarter report.

E. Conclusion. I am happy to answer any questions that you might have. Thank you.

ACTON/BOXBORO REGIONAL PUBLIC SCHOOLS **FY12 BUDGET STATUS REPORT**

	FY12 Budget Original	FY12 Budget Adjustments	FY12 Budget Current	FY12 Year End Projected Expenses	% Committed	FY12 Year End Projected Balance
Salaries, Teaching 01	\$16,006,402	\$131,000	\$16,137,402	\$16,155,566	100.1%	(\$18,164)
Salaries, Principals 02	\$741,686	\$0	\$741,686	\$757,046	102.1%	(\$15,360)
Salaries, Central Administration 03	\$421,151	\$0	\$421,151	\$435,622	103.4%	(\$14,471)
Salaries, Support Staff 04	\$2,940,641	\$0	\$2,940,641	\$2,991,281	101.7%	(\$50,640)
Salaries, Athletics 05	\$415,167	\$0	\$415,167	\$422,172	101.7%	(\$7,005)
Salaries, Buildings 06	\$280,104	\$0	\$280,104	\$356,111	127.1%	(\$76,007)
Salaries, Custodial 07	\$798,215	\$0	\$798,215	\$738,247	92.5%	\$59,968
Salaries, Home Instruction 08	\$7,133	\$25,000	\$32,133	\$24,333	75.7%	\$7,800
Salaries, Substitute 09	\$252,793	\$0	\$252,793	\$302,861	119.8%	(\$50,068)
Fringes, Course Reimbursement 10	\$28,000	\$0	\$28,000	\$28,000	100.0%	\$0
Fringes, Health Insurance 11	\$5,213,338	(\$89,000)	\$5,124,338	\$4,970,653	97.0%	\$153,685
Fringes, Other Ins 12	\$26,110	\$0	\$26,110	\$21,460	82.2%	\$4,650
Fringes, Unemployment 13	\$27,000	\$0	\$27,000	\$53,856	199.5%	(\$26,856)
Fringes, Workers Comp 14	\$90,000	\$0	\$90,000	\$107,108	119.0%	(\$17,108)
Fringes, Pensions 15	\$938,823	\$0	\$938,823	\$924,659	98.5%	\$14,164
Instructional Supplies 16	\$252,892	\$0	\$252,892	\$237,800	94.0%	\$15,092
Instructional Textbooks 17	\$135,167	\$0	\$135,167	\$135,679	100.4%	(\$512)
Instructional, Library 18	\$29,724	\$0	\$29,724	\$29,724	100.0%	\$0
Other, Capital Outlay 19	\$317,206	\$0	\$317,206	\$325,234	102.5%	(\$8,028)
Other, Prop/Casualty 22	\$100,865	\$0	\$100,865	\$63,968	63.4%	\$36,897
Other, Maintenance Buildings 23	\$359,880	\$0	\$359,880	\$641,872	178.4%	(\$281,992)
Other, Maintenance Outlays 24	\$200,242	\$0	\$200,242	\$218,582	109.2%	(\$18,340)
Other, Legal Service 26	\$102,776	\$0	\$102,776	\$102,776	100.0%	\$0
Other, Admin Supplies 27	\$584,087	(\$6,000)	\$578,087	\$609,087	105.4%	(\$31,000)
Other, Athletic Support 28	\$62,885	\$0	\$62,885	\$69,224	110.1%	(\$6,339)
Other, Custodial Support 29	\$72,409	\$0	\$72,409	\$74,699	103.2%	(\$2,290)
Other, Sped Transportation 30	\$788,332	\$0	\$788,332	\$788,443	100.0%	(\$111)
Other, Student Transportation 31	\$643,012	\$0	\$643,012	\$591,128	91.9%	\$51,884
Other, Travel 32	\$26,313	\$0	\$26,313	\$26,740	101.6%	(\$427)
Other, Sped Tuition 33	\$3,236,257	\$0	\$3,236,257	\$2,825,694	87.3%	\$410,563
Other, Utilities 34	\$1,285,751	(\$61,000)	\$1,224,751	\$1,126,751	92.0%	\$98,000
Other, Sewer 35	\$230,006	\$0	\$230,006	\$216,585	94.2%	\$13,421
Other, Debt Service 21	\$1,887,984	\$0	\$1,887,984	\$1,887,984	100.0%	\$0
GRAND TOTAL	\$38,502,351	\$0	\$38,502,351	\$38,260,946	99.4%	\$241,405

ACTON BOXBOROUGH REGIONAL SCHOOL DISTRICT GENERAL FUND REVENUE FY12

Updated: Feb, 2012

			ORIGINAL EST REVENUE	EST REV ADJUSTMTS	REVISED EST REVENUE	ACTUAL YTD REVENUE	REMAINING REVENUE
10003	45401	FEDERAL REVENUE - THRU STATE	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	46000	STATE REVENUE	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	46801	<i>Quarterly</i> CHAPTER 70 AID	\$6,969,133	\$0.00	\$6,969,133	\$3,484,566.00	\$3,484,567.00
10003	46804	<i>2nd, 3rd & 4th Q</i> SCHOOL CHOICE ASSESSMENT	(\$19,000)	\$7,762.00	(\$19,000)	(\$6,334.00)	(\$12,666.00)
10003	46805	<i>2nd, 3rd & 4th Q</i> CHARTER SCHOOL ASSESSMENT	(\$340,890)	(\$5,829.00)	(\$340,890)	(\$113,630.00)	(\$227,260.00)
10003	46806	SPECIAL EDUCATION ASSESSMENT	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	46807	<i>January & June</i> PUPIL TRANSPORTATION	\$685,568	\$51,973.00	\$685,568	\$342,784.00	\$342,784.00
10003	46808	SPED TRANSPORTATION	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	46809	<i>2nd, 3rd & 4th Q</i> CHARTER SCHOOL REIMBURSEMENT	\$23,819	(\$7,003.00)	\$35,616	\$11,872.00	\$23,744.00
10003	47501	<i>Monthly</i> REGIONAL ASSESSMENT ACTON	\$24,725,573	\$0.00	\$24,725,573	\$14,423,255.00	\$10,302,318.00
10003	47502	<i>Monthly</i> REGIONAL ASSESSMENT BOXBOROUGH	\$6,177,519	\$0.00	\$6,177,519	\$3,603,551.00	\$2,573,968.00
10003	48200	<i>Monthly</i>	\$12,000	(\$3,000.00)	\$12,000	\$9,009.43	\$2,990.57
10003	48403	<i>Monthly</i>	\$45,000	\$0.00	\$45,000	\$20,271.67	\$24,728.33
10003	48404	WORKERS COMP	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	48406	INSURANCE SETTLEMENT	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	48439	REGION RTEE BCBS	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	48440	REGION RTEE HPHC	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	48441	REGION ACTV BCBS	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	48442	REGION ACTV HPHC	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	48443	COBRA BCBS	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	48444	COBRA HPHC	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	49300	PREMIUMS ON LOANS	\$0	\$0.00	\$0	\$0.00	\$0.00
10003	49700	TRANSFER IN	\$0	\$0.00	\$0	\$0.00	\$0.00
			\$38,246,816	\$43,703.00	\$38,290,519	\$21,775,345.10	\$16,515,173.90

Examined During Budget Season
Examined During 2012-13 City Audit

2/24/2012

MEMORANDUM OF UNDERSTANDING

Revised from
packet version

This Memorandum of Understanding (the "Agreement") is entered into between the **ACTON-BOXBOROUGH REGIONAL SCHOOL DISTRICT**, a regional school district created under M.G.L. c. 71, §§ 15, *et seq.*, having its principal office at 16 Charter Road, Acton MA 01720 (the "District"), and the **Friends of Leary Field d/b/a the Friends of the Lower Fields**, a not for profit organized under the laws of the Commonwealth of Massachusetts, 13 Lincoln Drive, Acton, MA, ("FOLF"). FOLF is comprised of members of Acton-Boxborough Youth Soccer ("ABYS"), Acton-Boxborough Girls Youth Lacrosse, Acton-Boxborough Youth Lacrosse, Pop Warner Football and Cheering and members of the community at large.

FOLF, using the balance sheet of ABYS is seeking to help fund the construction of two synthetic infill turf fields of approximately 168,000 square feet at the lower fields on the ABRSD Central Campus ("the Lower Fields") adding over 5,000 available hours of community recreational space, at a cost of approximately \$3.0mm. All people in Acton and Boxborough, but especially our school aged children will have a dramatically increased ability to play and practice on high quality, uniformly graded fields, resulting in improved performance, fewer injuries, substantially more productive use and the preservation of open space in other areas of town.

The purpose of this document is to set forth the understanding between FOLF/ABYS and ABRSD regarding the construction, governance, scheduling and use of this field during the term of the FOLF/ABYS' construction loan and once the Loan is paid off.

In return for FOLF contributing over \$200,000.00 and ABYS assuming a loan of up to \$1.0mm ("the Loan") ABRSD agrees that:

Prior to Construction of the Lower Fields

1. ABRSD through its Director of Facilities will obtain plans from Gale & Associates for the construction and lighting of two turf fields and for construction of a parking area. ABYS agrees to match up to \$25,000.00 of costs incurred in obtaining such plans.
2. ABRSD will grant a ground lease to ABYS jointly and severally to construct the Lower Fields with the oversight and direction of ABRSD's Facilities Director.
3. With the ground lease in place, ABRSD will seek contractors for construction of the Lower Fields by going out to public bid. Such process to be directed and overseen by ABRSD's Facilities Director.
4. ABRSD will allow for the assignment of the ground lease to FOLF/ABYS' lender in the event of default on the Loan until the Loan is paid off.
5. ABRSD will allow for the assignment of rents to ABYS' lender in the event of default on the Loan until the Loan is paid off.

6. FOLF/ABYS with ABRSD's permission will allow a UCC to be filed with respect to the approximately 168,000 square feet of infill artificial turf installed at the Lower Fields.

During the Term of the Loan

7. ABRSD will assume the costs of maintenance for the Lower Fields including the parking area, bathrooms and concessions including trash removal.
8. ABRSD will pay the utility cost for the lighting at the Lower Fields.
9. FOLF/ABYS will assume the cost of snow plowing and will split the cost of the manufacturer's annual turf maintenance program.
10. FOLF/ABYS will schedule and collect rent for the use of the Lower Fields until the Loan is paid off per the terms of the Field Programming Agreement.
11. During the period of the Loan or sooner if the Loan is paid sooner, all net proceeds achieved from field rentals will be used to pay the ABYS loan with the following exceptions:
 - a. snow plowing;
 - b. Half of the annual turf maintenance cost for the two Lower Fields;
 - c. Establishing of a \$100,000 contingency fund; ("Contingency Fund"); and
 - d. Once the Contingency Fund is funded to \$100,000 and the ABYS Bank Loan is current, FOLF/ABYS will gift up to \$25,000.00 per year to ABRSD to off set bond operating expenses for the Lower Fields.
12. FOLF/ABYS will provide designated ABRSD representative monthly reports of all revenue and expenses incurred at the Lower Fields during the term of the Loan.
13. FOLF/ABYS will reimburse ABRSD for 1/2 of the cost of annual synthetic turf maintenance of the Lower Fields and ABRSD will assume the remaining cost.

Once the Loan is Paid Off

14. Once the Loan is paid off, ABRSD, will take over the scheduling, management and full maintenance of the Lower Fields.
15. Once the Loan is paid off, Acton-Boxborough Girls Youth Lacrosse, Acton-Boxborough Youth Lacrosse, Pop Warner Football and Cheering and ABYS will be paid back their initial investments made during this project including funds paid for design and all funds

paid in relation to the Loan including the initial down payment from the next revenues generated once the Loan is paid off, without interest.

Youth Soccer will contribute \$27,750.00 for pre-design;
Girls Lacrosse will contribute = \$2,000.00 for pre-design.
Boys Lacrosse will contribute = \$4,000.00

AB Pop Warner and Cheering will contribute =\$500.00 for pre-design.

The Programs will each contribute funds for a down payment of the Bank Loan or to be used as designated by the Bank Loan lender:

Youth Soccer will contribute \$175,000.00;
Girls Lacrosse will contribute = \$8,000.00
Boys Lacrosse will contribute = \$15,000.00
AB Pop Warner and Cheering will contribute =\$2,500.00

16. Once the Loan is paid off ABRSD would set aside no less than 2200 hours for Acton and Boxborough Youth sports programs. The remaining approximately 3000 hours are for the use of ABRSD and could be used at its discretion to run programs or be rented to other groups that would pay for use of the Lower Fields on a program, season, hourly or per capita basis or as ABRSD sees fit in order to generate revenue for ABRSD.

17. It would be understood that since Acton-Boxborough Girls Youth Lacrosse, Acton-Boxborough Youth Lacrosse, Pop Warner Football and Cheering and ABYS are contributing pre-construction design funds which will not be paid back if the Lower Fields are not built or if the Loan is not paid off and that ABYS will be assuming the risk of a loan of up to \$1.0MM, that ABRSD will take this into account in giving most favored status to these organizations when it comes to scheduling the 2200 hours for Acton and Boxborough Youth sports programs, but assuring that other youth programs get some use of the Lower Fields. FOLF/ABYS understand that over time the size of different organizations changes and ABRSD will seek a fair scheduling distribution taking these factors into account.

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18. The parties strictly prohibit the sale of any items including food, beverage, apparel and advertising on the site without written authorization of ABRSD and ABYS during the term of the Bank Loan and ABRSD thereafter.
19. Concession Stand and Naming/Advertising rights can be authorized by ABRSD and ABYS during Bank Loan term and by ABRSD thereafter.

Lower Fields Committee

The Superintendent of ABRSD shall appoint a Lower Fields Committee to meet at the Superintendent's discretion and at least annually regarding the governance of the Lower Fields

and to review the financials governing the Lower Fields including the financials of FOLF/ABYS with respect to the Loan balance and the upkeep and maintenance costs of the Lower Fields.

The appointed Lower Fields Committee shall consist of three members of ABRSD and two officers of FOLF or town youth sports programs using the Lower Fields. During the term of the Loan these members will be appointed by the FOLF President and shall consist of a representative for ABYS and a representative for Acton Boxborough Girls and Boys Lacrosse.

Reservations for Lower Fields Once Loan is paid off will be made on the following classifications:

TBD (draft in progress)

Revocation of Field Permits

ABRSD and FOLF/ABYS will revoke a field reservation permit under the following conditions:

1. Use of alcohol at field site or parking lots.
2. Use of other controlled substances at field site or parking lots.
3. Excessive litter.
4. Cars parked on the field or other grass areas.
5. Use of foul or abusive language.
6. Other misuses determined by the Acton Recreation Department or the Acton-Boxborough Community Education Department.

Additional field requests made by any individual/team whose permit has been revoked will be denied for the balance of the season. Teams/individuals will be held responsible for any field damage caused by misuse.

FOLF Lower Field Programming Agreement

This FOLF Lower Field Programming Agreement ("Programming Agreement") is entered into by and between Acton-Boxborough Youth Soccer ("Youth Soccer"), Acton-Boxborough Girls Youth Lacrosse ("Girls Youth Lacrosse"), Acton-Boxborough Boys Youth Lacrosse ("Boys Youth Lacrosse") and Acton-Boxborough Pop Warner Football ("Pop Warner Football") (collectively "Programs") and the Acton-Boxborough Regional School District ("ABRSD").

The Programs have entered into this Programming Agreement in connection with, and as a predicate to, their signing of a Memorandum of Understanding (the "Memorandum of Understanding"), which sets forth the understanding between ABRSD and the Friends of Leary Field, Inc. d/b/a the Friends of Lower Fields ("FOLF"), with respect to the construction, governance, scheduling and use of two synthetic infill turf fields of approximately 168,000 square feet at the lower fields on the ABRSD Central Campus ("the Lower Fields"). For clarity, FOLF is comprised of members of Youth Soccer, Girls Youth Lacrosse, Boys Youth Lacrosse, Pop Warner Football, ABRSD and members of the Acton and Boxborough communities at large.

This Programming Agreement memorializes the agreement by and between each Program and ABRSD regarding the scheduling and use of the Lower Fields, any user fee(s) associated with the Lower Fields and the scheduling and use of alternative fields in the event such need arises.

Bank Loan Repayment Period and Capital Payoff Period

Bank Loan Repayment Period

The Bank Loan Repayment Period is defined as that period of time during the term of the bank loan (the "Bank Loan") that is to be secured to finance part of the construction of the Lower Fields ("Bank Loan Repayment Period").

Capital Loans Payoff Period

As part of the Lower Fields Projects, the Programs have each loaned FOLF capital funds (the "Capital Loans") to help finance the project. The Capital Loans Payoff Period ("Capital Loans Payoff Period") is defined as that period of time after the payment in full of the Bank Loan where FOLF or ABRSD collects revenue from use of the Lower Fields to repay the Programs their Capital Loans.

Scheduling and Use of the Lower Fields and Alternative Fields

During the Bank Loan Repayment Period and Capital Payoff Period, FOLF will schedule use of the Lower Fields in a manner that is substantially consistent with the Approved Schedule,

which is attached hereto as Exhibit A; provided, however that Youth Soccer agrees that if Pop Warner Football's Elm Street Fields are closed on either Tuesday or Thursday by the Town of Acton, then Youth Soccer will share half of one field with Pop Warner Football at the Lower Fields complex. Pop Warner Football agrees to provide advanced notice of such event to the Lower Fields Scheduler if possible so all coaches are aware of the sharing arrangement for any such Tuesday or Thursday evening.

The Approved Schedule establishes a minimum amount of time that each of the Programs will be entitled to use the Lower Fields during the Bank Loan Repayment Period and the Capital Loans Payoff Period. The Programs agree that they will not sublease, assign or transfer their scheduled time and any unused time will go back to FOLF to be used by another Program or rented.

The Approved Schedule also establishes a framework of acceptable days and times for use of the Lower Fields at the present time. The Approved Schedule may be amended from time to time only by unanimous agreement of the members of the Scheduling Committee of FOLF which will be made up of one member of ABRSD, one member of Pop Warner Football, one member of Girls Youth Lacrosse, one member of Boys Youth Lacrosse and one member of Youth Soccer.

During the Bank Loan Repayment Period, the Programs each recognize that Youth Soccer is the obligor on the Bank Loan and (without any effect on the unanimous votes requirement on changing the Approved Schedule and the Field Usage Fee (defined below)), that Youth Soccer has control over the decisions relating to the payment of the Bank Loan.

The allotted time for use of the Lower Fields once the Bank Loan is repaid and the Capital Loans repaid (currently believed to be 22000 hours per year) will be scheduled on an annual basis by ABRSD in cooperation with FOLF in accordance with the following agreed ranges:

PROGRAM USE ONCE LOAN IS REPAID	AVAILABLE YEARLY HOURS
Youth Soccer	1460
Girls Youth Lacrosse	345
Boys Youth Lacrosse	345
AB Pop Warner Football/Cheering	50
ABRSD ¹	3000

Once the Bank Loan is repaid Acton Boxborough Community Education ("AB Community Ed") will assume responsibility for the field scheduling and the repayment of the

¹ As needed and by agreement, Youth Soccer, Girls Youth Lacrosse, Boys Youth Lacrosse and Pop Warner Football may use any hours that are unused by ABRSD.

Capital Loans. The Programs agree to meet at least annually with AB Community Ed to discuss scheduling needs, and to reasonably cooperate in setting a schedule for each Program's use of the Lower Fields in conjunction with AB Community Education. The minimum and/or maximum number of hours allotted to each of the Programs may be amended from time to time by unanimous agreement of the Scheduling Committee of FOLF. Any disagreement regarding scheduling and/or the minimum / maximum yearly hours of usage shall be brought to and resolved by the Lower Fields Committee, which is defined in the Memorandum of Understanding.

User Fees for Use of the Lower Fields and Access to Alternative Fields

The Programs are working together with respect to the development and use of the Lower Fields, and they acknowledge the benefits of achieving this common goal. The Programs also acknowledge that access to and use of the Lower Fields is a necessity of each of the Programs.

Although the goal is that the Programs will not pay to use the Lower Fields, the Programs recognize that certain economic conditions may arise, and that payment of a fee for use of the Lower Fields will be required.

The per-participant fee ("Field Usage Fee") shall be not more than \$15.00 per registered participant for each Program for each season. So for example, each time a participant registers in a member Program, \$15 is due FOLF, except Pop Warner Football whose fee shall be no more than \$7.50 per registrant when the other Programs are no more than \$15.00. The "Field Usage Fee" can be set at any level below the \$15.00 on an annual level beginning three years after the initial year of use. As long as the Bank Loan is current, the Field Usage Fee cannot be increased for any Program beyond \$15.00 per registered participant without the unanimous vote of the Scheduling Committee of FOLF. In the event that the imposition of a Field Usage Fee greater than \$15.00 causes one or more of the Programs to require access to alternative town and/or school fields, the Programs shall accommodate such a requirement and reasonably cooperate with respect to the scheduling and use of alternative fields. Any disagreements regarding the assessment of the Field Usage Fee and/or scheduling of the Lower Fields shall be brought to and resolved by the Lower Fields Committee as defined in the Memorandum of Understanding.

During the Bank Loan Repayment Period and Capital Loans Payoff Period, it is the intent of the Programs that they will work together for the benefit of all Programs and to keep each other's Program viable. This Programming Agreement will not be used to penalize any individual Program.

Capital Contributions to the Lower Fields Project

The Programs agree to make contributions to the Lower Fields project based on the size of their respective programs per season and the number of hours of their expected usage.

Youth Soccer will contribute \$27,750.00 for pre-design;
Girls Lacrosse will contribute = \$2,000.00 for pre-design.
Boys Lacrosse will contribute = \$4,000.00
AB Pop Warner and Cheering will contribute =\$500.00 for pre-design.

The Programs will each contribute funds for a down payment of the Bank Loan or to be used as designated by the Bank Loan lender:

Youth Soccer will contribute \$175,000.00;
Girls Lacrosse will contribute = \$8,000.00
Boys Lacrosse will contribute = \$15,000.00
AB Pop Warner and Cheering will contribute =\$2,500.00

[include any typical contract provisions regarding governing law/jury trial waiver, entire agreement, counterparts etc.?]

IN WITNESS WHEREOF, the parties hereto have caused this Programming Agreement to be executed under seal as of the day and year first above written.

Signature

Print Name

Title

Duly authorized by the
Board of Acton-Boxborough Youth Soccer

Signature

Print Name

Title

Duly authorized by the
Board of Acton-Boxborough Girls Youth Lacrosse

Signature

Print Name

Title

Duly authorized by the
Board of Acton-Boxborough Boys Youth Lacrosse

Signature

Print Name

Title

Duly authorized by the
Board of Acton-Boxborough Pop Warner Football

Signature

Print Name

Title

Reviewed and Approved by Acton-Boxborough Regional School District

Acton-Boxborough Regional School District FY'13 Budget

School Committee Meeting
March 1, 2012

ABRSD FY'13 Budget

(in thousands)

	AB
FY'12 Final	\$38,502
FY'13 Budget	\$39,114
\$ Change from Final FY'12	\$612k
% Change from Final FY'12	1.59%

ABRSD FY'13 Budget FY12 to FY13 By % Increase?

ABRSD Level Service	.90%
Lower Fields Construction	.39%
OPEB Trust Contribution	.61%
Federal EdJobs Grant	(-1.23%)
Investment Budget Recommendations	<u>.92%</u>
 FY'13 ABRSD Preliminary Budget	 1.59%

FY'13 ABRSD Budget (Continued)

Based on our **current numbers** and our **current state aid estimates**; and using an **updated split** of ABRSD costs based on the updated three-year enrollment percentages per our current regional agreement (Boxborough 19.33%, Acton 80.67%):

Total Acton + Boxborough Assessments
increase from
\$30,903,091 in FY'12 to \$31,094,432 in FY'13,
a \$191,341 increase, or:

Acton	\$467,741	increase
Boxborough	(\$276,400)	decrease

FY'13 ABRSD Budget

Investment Budget Now Included

Senior High:	1.0 FTE Counselor	(\$54k)
	2.0 FTE English Teachers	(\$108k)
	1.0 FTE SPED Assistant	(\$26k)
Junior High:	.2 FTE Drama Teacher	(\$14k)
Other:	.5 FTE Budget Analyst	(\$30k)
	\$11,000 for SH Curriculum Textbooks	
	Line Item	(from \$29k to \$40k)
	\$35,261 for JH Curriculum Textbooks	
	Line Item	(from \$4k to \$40k)
	Health Insurance For New Requested Positions	(\$74k)

TOTAL: \$354k

FY'13 ABRSD Budget (Continued)

January 5, 2012 (as proposed)	\$39,915,260
----------------------------------	--------------

February 2, 2012 (initial vote)	\$39,915,260
------------------------------------	--------------

March 1, 2012	\$39,114,804
---------------	--------------

(\$800,456 lower than 1-5-12)

FY'13 ABRSD Budget (Continued)

Changes to FY'13 ABRSD Budget since January:

Savings from Bus Lease Bid & Lease Equip (\$71k)

Savings from Health Insurance Design Changes (\$329k)

OPEB Trust Contribution \$236k

Lower Fields Construction Now Finalized (\$125k)

Misc Corrections & HI Enrollment Changes (\$36k)

EdJobs Grant Utilization (\$473k)

TOTAL (\$800,456)

FY'13 ABRSD Budget Motion

\$39,114,804

Office of the Director of Curriculum and Assessment

Acton Public Schools

Acton-Boxborough Regional School District

(978) 264-4700 x 3213

<http://ab.mec.edu/curriculum/curriculum.shtml>

TO: Stephen Mills, Superintendent
FROM: Deborah Bookis, Director of Curriculum and Assessment
DATE: February 15, 2012
RE: Arts Graduation Requirement

Last year, ABRHS Principal Dr. Callen, Performing Arts Director Mark Hickey, Visual Arts Director Diana Woodruff and I began discussing the possibility of an arts graduation requirement. It was clear from our experiences in our respective positions that the arts are highly valued and respected by students, parents, faculty, administration and our community.

We spent some time gathering data on how many students are already taking an arts course at ABRHS. It was determined that, given the high percentages (88% in 2010, 92% in 2011, and 88% for 2012) the school would not need to add additional staff, classes or space in order to accommodate this requirement. Next, we gathered information about twelve other districts' graduation requirements, all of which have an arts requirement ranging from one semester to two full years.

Additionally, we met with the teachers in the Communication and Industrial Arts classes to hear their ideas and feedback. It was then decided to create a video illustrating the many ways in which students would be able to fulfill this requirement and to highlight how the arts contribute to a student's education.

The proposal, along with the video, was shared with the faculty and then again at a separate meeting with members of the ABRHS School Council. Both the faculty and School Council fully support an arts graduation requirement beginning with the class of 2016.

Proposal for an Arts Graduation requirement at ABRHS

2.5 credits in:

Communication Arts, Industrial Arts, Performing Arts or Visual Arts

Implement requirement for the Class of 2016

Supporting documents are in the packet and will be referenced after the video.

*"The arts make vivid the fact that neither words in their literal form nor numbers exhaust what we can know. The limits of our language do not define the limits of our cognition."
Elliot Eisner*

The Arts at AB

**AB students who took at least one Arts course in four years in Communication Arts,
Industrial Arts, Performing Arts, or Visual Arts:**

Class of 2010	Class of 2011	Class of 2012
88.2%	92.3%	87.7%
<i>(405 of 459 students)</i>	<i>(467 of 506 students)</i>	<i>(408 of 465 students)</i>
238 students took 1 - 3 Arts courses	275 students took 1 - 3 Arts courses	252 students took 1 - 3 Arts courses
146 students took 4 - 7 Arts courses	160 students took 4 - 7 Arts courses	126 students took 4 - 7 Arts courses
21 students took 8 - 12 Arts courses	32 students took 8 - 13 Arts courses	30 students took 8 - 11 Arts courses
<i>50 students took 0 Arts courses</i>	<i>39 students took 0 Arts courses</i>	<i>57 students took 0 Arts courses</i>

Graduation Requirements in the Arts

These area high schools have a graduation requirement in the Arts:
(requirements range from one semester to 2 full years of Arts courses)

Bedford	Concord-Carlisle	Littleton	Waltham
Belmont	Lexington	Needham	Wayland
Brookline	Lincoln-Sudbury	Newton	Weston

AB has no graduation requirement in the Arts.

Proposal for an Arts graduation requirement at AB:

**2.5 credits in:
Communication Arts, Industrial Arts, Performing Arts or
Visual Arts**

Implement requirement for the Class of 2016

**"All that is valuable in human society depends on the opportunity for
development accorded the individual."**

Albert Einstein

**"The arts' position in the school curriculum symbolizes to the young what adults
believe is important."**

Elliott Eisner

7.4.2

guardian TheObserver

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John Maeda: Innovation is born when art meets science

The technology and design guru argues that for invention to occur, scientists must embrace the art world



Tom Lamont
The Observer, Saturday 13 November 2010

A [larger](#) | [smaller](#)



John Maeda at the Rhode Island School of Design Photograph: David O'Connor Photography

A graphic designer and computer scientist, known for his work on the online computer game *Second Life*, as well as the author of bestselling self-help book *The Laws of Simplicity*, John Maeda has made great use of dual educations at the Massachusetts Institute of Technology and art school. Drawing from his experiences in these two disciplines, the 44-year-old has come to believe that too stark a distinction is drawn between science and the arts. It is Maeda's conviction that scientists need art and artists in their professional lives in order to invent and innovate successfully, and with a particular focus on education he has toured the world to promote the idea that government-approved "Stein" subjects (science, technology, engineering and maths) should be widened to include art; "turning Stem into Steam," as he puts it. This week Maeda, who is president of the Rhode Island School of Design, will expound on these ideas at an experimental installation at London's Riflemaker gallery, where he will "dispense wisdom from a sandpit". See Riflemaker.org for more on this eccentric project.

The Laws of Simplicity
(Simplicity: Design, Technology, Business, Life)
by J Maeda

Why does science need artists?

We seem to forget that innovation doesn't just come from equations or new kinds of chemicals, it comes from a human place. Innovation in the sciences is always linked in some way, either directly or indirectly, to a human experience. And human experiences happen through engaging with the arts – listening to music, say, or seeing a piece of art.

So to help them become more humanist, you'd parachute artists and musicians into laboratories?

THE LAWS OF
SIMPLICITY

John Maeda

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Which already happens to some degree with artist-in-residence programmes in scientific labs. They're usually very small, but these programmes are seen as quite desirable by scientists. Because all scientists are humans, and they are humanists inside, and by bringing that part out, innovation happens more naturally.

Can you think of an example where an injection of the arts has helped the sciences?

I recently saw something in *Time* magazine, a famous Nobel laureate chemist making molecular models out of clay. It shows how these more fluid, abstract materials traditionally belonging to the artist lend themselves better to ways of thinking about the world, as opposed to some kind of ball-and-stick model that shows a constrained view. Art helps you see things in a less constrained space. Our economy is built upon convergent thinkers, people that execute things, get them done. But artists

and designers are divergent thinkers: they expand the horizon of possibilities. Superior innovation comes from bringing divergents (the artists and designers) and convergents (science and engineering) together.

Such as?

Look at Apple's [iPod](#). A perfect example of technology – an MP3 player – that existed for a long time but that nobody ever wanted, until design made it something desirable, useful, integrated into your lifestyle. Look at the success of [Mint.com](#) [a colorful money-management website] which has recently been sold. It's an app in which 80% of the experience is what you see, how you touch it. Not the technology. I'm also interested in how art and design links into leadership. Because leaders now are facing a very chaotic landscape, things are no longer black and white, things are harder to predict. What better mindset to adopt than the artist's, who is very used to living in an ambiguous space? Real innovation doesn't just come from technology, it comes from places like art and design.

George Osborne recently announced protection in the higher-education cuts for the so-called Stem subjects, but not the arts. Is this blinkered?

You know, it's easy for politicians to look at the measurability of a science and maths education. I mean, fill out 100 questions, you get 100 right or 50 right or zero right, it's easy to measure. There's no test that can give you a score from zero to 100 on the question, "Is this student a good writer?" And society's so focused on measurement. It's awkward and sad. Singapore or Japan are highly known test-taking countries focused on science and engineering, yet are desperate to find innovation. And where are they looking? They're looking to the west for new ideas. It's kind of like a dog chasing after its tail a little bit – this weeding out of the idea that expression, something that exists in the intuition space, can matter. I mean, it's ironic that the people who talk about these kind of things [cuts to the arts] are all counting on things to carry their message – like images, the written word – as givens.

Do you think that scientists tend to lack humanity?

Scientists would say otherwise. But scientists strive to be pure, to live in what's called a "concept space". And by doing so they tend to move away from the core humanist principles that actually put those two arms and legs on them in the first place. The best scientists that I've met are those that are humanists and scientists at the same time.

7.4.3



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Your Life in 2020

Your Life In 2020

John Maeda 04.08.10, 6:30 PM ET

The future of "ubiquitous computing" has been heralded for decades. It sounds grandiose--computing, everywhere!--but ironically, a future of ubiquitous computing is one where computers actually go unnoticed. That's 2020. It is when Nicholas Negroponte's assertion in 1995 of "being digital" switches to "been digital" because we will have been there and done that. Kids who have grown up stealing free views of recent movie releases online or regularly chatting with a friend in Bangalore or Atlanta will be working adults in a world where the notion of "work" has changed because of digital technology. But it's no longer "technology" in 2020 anymore--it's just how we get things done.

Consider attempts by schools to quell mobile phone usage in the classroom. In many parts of Asia, where the mobile phone took hold sooner than in the U.S., schools have given up. To a student in Hong Kong, their mobile phone is as vital as the beating of their heart. The word "mobile" means your world can all "go" with you, and by 2020 it will be too hard to imagine going without. We won't carry today's angst of feeling tied to our mobile devices in an apologetic sort of way. Instead, it will be the accepted norm, an innate part of daily life, and will vanish within our collective consciousness.

But if technology and the ability to be connected disappear further into the background, what will occupy our foreground? A bit of the humanity we've always valued in the "real world." Legislators who are currently fixated on STEM (Science, Technology, Engineering and Math) education as the key to innovation will realize that STEM needs some STEAM--some **art** in the equation. We'll witness a return to the integrity of craft, the humanity of authorship, and the rebalancing of our virtual and physical spaces. We'll see a 21st-century renaissance in arts- and design-centered approaches to making things, where you--the individual--will take center stage in culture and commerce.

Video: How To Create The Future

The software industry is poised to embrace its craft heritage. By 2020 software will return to a cottage industry, with bespoke applications made by many, rather than today's industrialized, Microsoft-esque mass-production and distribution model. It will be part of a larger world movement to make things by hand, infused with emotion and integrity. This phenomenon is already becoming visible in the rise of the "apps" market for mobile phones. With few dominant players and close-to-zero distribution costs, practically anyone can "ship" an app on the iPhone, Android or BlackBerry. These apps are often built with care and attention to the design that big companies' offerings lack. Look at the exquisite quality made by game companies like Iconfactory; or the many iPhone apps like ToonPaint that focus on letting users make "hand-crafted" creative content on their phones.

Rather than be content to accept corporate anonymity, we will rediscover the value of authorship. In 2020 technology will continue to enable individual makers to operate in the same way that once only large corporations could do. Witness the growth of individuals as "brands-of-one" in the social media space, broadcasting their news in the same fashion as major media outlets, or in software apps marketplaces, where "Bob Schula" can hawk his wares right next to "Adobe Systems," and it's just as easy to buy hand-stenciled napkins from a seller on Etsy as it is to buy them from Crate & Barrel. You might say it is a return to learning to trust individuals again, instead of relying on an indirect connection to a product through trust in its brand. Certainly our trust in those brands is already being tested right now.

Digital metaphors will reconnect to their original physical sources as a way to recapture what has been lost in translation. A creative director friend of mine recently commented how he noticed that younger designers were absolutely captivated when he used tracing paper in layers to develop a concept over an existing printed photograph. They commented to him, "Wow! That's so fast. I could never make those layers in Photoshop so quickly." Today we fill folders on our computer desktop to the brim with absolutely no sense of scale, no notion of what is a "full" or "less full" folder. They may be more easily searched, but there's a reason why paper-based systems comfort us so well with their tacit communication of what is more vs. what is less. Unable to let this go, we will see many new designs that best leverage what is good in virtual with what is good in the physical world. The subtleties and grayness that we can so easily grasp off the screen will make their way on to it.

The last 20 years have been so full of technological change that technology and the digital world has become the dominant narrative in our consumer culture. Educators, legislators, futurists and social scientists can't help but fixate on it. As we become more accustomed to it, happily, some breathing room will open up for a different conversation about what we want back in our lives.

So, what will take technology's place? It begins with art, design and you: Products and culture that are made by many individuals, made by hand, made well, made by people we trust, and made to capture some of the nuances and imperfections that we treasure in the physical world. It may just feel like we've regained some of what we've lost in 2010.

John Maeda is president of the Rhode Island School of Design, and the author of several books, including his latest, The Laws of Simplicity.

Video: How To Create The Future

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7.4.4

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Cultivating the Imagination

Martha Nussbaum is the Ernst Freund Distinguished Service Professor of Law and Ethics at the University of Chicago. Her most recent book is "Not for Profit: Why Democracy Needs the Humanities."

Updated October 17, 2010, 7:00 PM

Cuts in the humanities are bad for business and bad for democracy. Even if a nation's only goal were economic prosperity, the humanities supply essential ingredients for a healthy business culture.

Why is the U.S.
moving away from
the humanities just
at the time that our
rivals are
discovering their
worth?

Nations such as China and Singapore, which previously ignored the humanities, are now aggressively promoting them, because they have concluded that the cultivation of the imagination through the study of literature, film, and the other arts is essential to fostering creativity and innovation. They also have found that teaching critical thinking and argumentation (a skill associated with courses in philosophy) is essential in order to foster healthy debate inside a business world that might too easily become complacent or corrupt.

We in the U.S. are moving away from the humanities just at the time that our rivals are discovering their worth. But a healthy business culture is not all that life in America is about.

We also pride ourselves on our open democracy, and on the freedoms of speech and the press that make our political life one in which the people rule. To keep democracy vital, we urgently need the abilities that the humanities foster. First, we need critical thinking: the ability to debate respectfully with others, to tell a good argument from a bad one, to examine tradition and prejudice in a Socratic spirit.

Second, we need history: a knowledge of the world and its many cultures and religions. Knowledge is not a guarantee of good political behavior, but ignorance is a virtual guarantee of bad behavior. In a world full of simple stereotypes, we will only preserve democratic values of debate and mutual respect if we try hard to understand the past and the present.

Finally, we need the imaginative ability to put ourselves in the positions of people different from ourselves, whether by class or race or religion or gender. Democratic politics involves making decisions that affect other people and groups. We can only do this well if we try to imagine what their lives are like and how changes of various sorts affect them. The imagination is an innate gift, but it needs refinement and cultivation; this is what the humanities provide.

"But my child needs a job," a parent might say. Yes, but preparing for a job and learning the lessons of the humanities are not mutually exclusive. The American system of higher education, unlike almost all other higher education systems in the world — where students enter university to study just a single subject — encourages students to major in one subject, often one related to future work, while taking general education courses in a variety of disciplines.

The future engineer or computer programmer can still learn skills of argument from Plato's dialogues and gain a deeper grasp of the lives of others through literature and the arts.

If we cut the humanities, our nation will be the loser, both economically and politically.

Topics: Education, academia, colleges

To: Dr. Callen, Dr. Mills and members of the School Committee
 From: Debbie Leavitt, Cathy Hammond and Nicolas Cosseron, French teachers at ABRHS

Dear Dr. Callen, Dr. Mills and members of the School Committee:

The other French teachers at the high school and I are pleased to be able to offer our French students our biannual French exchange with the Lycée International in Saint Germain-en-Laye, France. The exchange took place from 1997 through 2004 and renewed the opportunity in 2008-2009 and 2010-2011. This is a wonderful educational experience for our students to welcome a French student here in Acton for two weeks in the fall and then spend two weeks living with a family in Saint Germain, attending a French high school, and visiting many famous tourist sites they have studied in Paris and its environs. There are many linguistic advantages to an exchange as there is ample time for linguistic practice at home in the evenings and on the weekends as well as during the day in school and while on excursions. Cultural understanding and appreciation is developed not only through viewing the major cultural sites but through everyday living in a familial context. Finally, the economic advantages of an exchange are many as we save hotel and meal costs as well as reducing costs by not booking with a tour company. The proposed dates which correspond to school vacation in France are the following:

Lycée to Acton/Boxborough: October 21 – November 3, 2012
 ABRHS to France: February 16 – March 2, 2013

Acton-Boxborough students will only miss a total of 5 days of classes as the first week of our trip to France will be scheduled to coincide with the February break. Our students will miss no school time during the French students' visit to AB.

Based on our previous experience and exploration of the Air France website indications are that a round trip ticket for a non-stop flight on Air France will cost approximately \$1,100. We will continue to explore our options but will want to lock in prices as soon as possible. In the past, hosting families have provided all meals (including bag lunches for excursions) and costs associated with activities during the homestay. In addition to their airfare, students pay for fees at tourist sites in the hosting country, transportation costs associated with any excursions, snacks and souvenirs. The 20 students we will travel with will also cover the costs of the trip for the 2 chaperones who also get a small stipend for their additional work and responsibilities. As mentioned previously, our serving as organizers helps to keep the cost down to half of what it would cost to use a tour company. Traditionally these costs have added between \$300 - \$500 depending upon our excursions and the exchange rate, so we anticipate an overall cost of approximately \$1,500 - \$1,600. We reimburse remaining monies to the participating families, once all expenses have been paid.

We hope that the trip meets with your approval. We are sending you all the necessary forms in advance with the hopes of inclusion in the packet for consideration at the March 15th meeting of the School Committee. We are including a copy of the last exchange's itinerary to give an idea of the types of excursions offered. Please contact Debbie via e-mail at school (dleavitt@abschools.org) or via telephone at home) if you have any questions or if you require the presence of a member of our team at the School Committee meeting. Thank you for your consideration of this opportunity.

Sincerely,

Debbie Leavitt, Cathy Hammond and Nicolas Cosseron

Acton Public Schools
Acton-Boxborough Regional School District
Acton, MA

OVERNIGHT, INTERNATIONAL and/or OUT-OF-STATE
FIELD TRIP PERMISSION FORM

Submit for Superintendent and School Committee approval

The first step in this process is to meet with Blake Lochrie-our International Field Trip Coordinator to go over initial details.

Please file at least four (4) weeks in advance for 1-3 day trips

Please file at least three (3) months in advance trips longer than 3 days and/or trips with per student cost greater than \$500.00

Please TYPE or use COMPUTER FORM

- Name of Teacher(s): Cathy Hammond, Debbie Leavitt, Nicolas Cosseron
- School: Acton Boxborough Regional High School
- # of Students going: 20 # of Chaperones (gender): 2 female chaperones
Names of Chaperones: Cathy Hammond and Debbie Leavitt
- Date(s) of Trip: February 16, 2013 – March 2, 2013 School Time Involved: 5 days
- Purpose of Trip/Destination: French exchange trip to experience the culture and practice the language (please see attached proposal)
- Have you taken this trip before? Yes
- Any special arrangements required (such as extra insurance, ADA accommodations)?
- Cost per Student: (Please describe how the cost is determined.)
- Who will pay for the trip? Students & Parents
- Has any fundraising been done? No If so, what? _____


- Are any parents driving? No
If so, have appropriate insurance forms been filled out? _____
- Have you followed the procedure outlined in Policy IJOA? Yes
- Other comments:

✓ Approved _____ Not Approved

Cheryl L. Rip
Department Leader


2/17/12
Date

☒ Approved ☐ Not Approved


Principal

2/17/12
Date

☒ Approved ☐ Not Approved



Superintendent

2/22/12
Date

_____ Approved _____ Not Approved

School Committee

Date

ECHANGE US ACTON 2011 – PROGRAMME ACCUEIL

dimanche 20 février:

15h50 : arrivée à Roissy Charles de Gaulle (vol #638 de Swissair en provenance de Zurich):
accueil par les familles.

Dimanche fin d'après-midi et soirée en famille.

lundi 21 février: Paris

8h00 Rendez-vous: RER de St Germain-en-Laye, sortie principale, côté Hôtel de Ville.

Transport: RER

Visite du Quartier Latin.

La Conciergerie: visite à 10h45.

La Sainte Chapelle: visite à 12h.

Déjeuner: prévoir pique-nique.

Notre-Dame: visite des tours à 14h.

Retour au RER de St Germain: 18h00

mardi 22 février: Paris

8h:00 Rendez-vous : RER de St. Germain

Tour Eiffel: visite à 10h30.

Bateaux Parisiens: 12h

Déjeuner: prévoir pique-nique.

Musée d'Orsay: visite guidée à 14h.

Retour au RER de St Germain: 18h00

mercredi 23 février: Paris

8h00 Rendez-vous: RER de St Germain

Visite du Louvre: 10h00.

Déjeuner: Jardin des Tuileries: prévoir pique-nique.

Champs-Élysées et l'Arc de Triomphe.

Retour au RER de St Germain: 18h00

jeudi 24 février: Caen

7:30 Rendez-vous: Château du Lycée International devant la grille à l'arrêt du bus.

Mémorial de Caen: visite à 11h, film 'Jour J' à 13h (15 minutes).

Déjeuner: prévoir pique-nique.

Plages de Normandie.

Cimetière américain: 15h30, visite du centre et film, suivi d'une visite guidée du cimetière à 16h15.

Retour au lycée: 20h00

vendredi 25 février: en famille

samedi 26 février: en famille

dimanche 27 février: en famille

lundi 28 février: Journée au Lycée International.

8h00 : Cours avec les correspondants.

9h05 : Rendez-vous devant l'Agora pour une visite de l'école

9h50 : Le reste de la journée en cours avec les correspondants: ne pas oublier
de donner votre emploi de temps.

Déjeuner: cantine avec les correspondants (gratuit pour les Actoniens).

mardi 1 mars: St Germain-en-Laye (matinée)

9h00 Rendez-vous: Château du Lycée devant la grille à l'arrêt du bus.

Visite du centre ville et du marché.

Retour au lycée par bus:

Déjeuner: prévoir pique-nique.

Après-midi en cours avec les correspondants.

mercredi 2 mars: Rouen

8h30: Rendez-vous: le Château du Lycée devant la grille à l'arrêt du bus.

Visite guidée de la vieille ville: 11h-13h.

Déjeuner: prévoir pique-nique.

Retour au lycée: 17h00

Pot Luck Supper: repas d'amitié pour tous les participants de l'échange et les familles: Salon Rouge du Château du Lycée: 18h00 à 20h00.

jeudi 3 mars: Versailles

8h1 Rendez-vous: Château du Lycée devant la grille à l'arrêt du bus.

Visite guidée du Château à 11h.

Déjeuner: prévoir pique-nique.

Domaine de Marie-Antoinette.

Retour au lycée: 17h00

vendredi 4 mars : Paris

8h00 Rendez-vous: Château du Lycée devant la grille à l'arrêt du bus.

Musée Grévin: visite à 10h30.

Déjeuner: prévoir pique-nique.

Visite de Montmartre.

Retour au lycée: 1700

samedi 5 mars: Départ: rendez-vous à l'aéroport de Roissy Charles de Gaulle à midi.

Swissair vol # 639 pour Zurich, départ 14h55.

Acton Public Schools
Acton-Boxborough Regional School District
Acton, MA

OVERNIGHT, INTERNATIONAL and/or OUT-OF-STATE
FIELD TRIP PERMISSION FORM

Submit for Superintendent and School Committee approval

The first step in this process is to meet with Blake Lochrie-our International Field Trip Coordinator to go over initial details.

Please file at least four (4) weeks in advance for 1-3 day trips

Please file at least three (3) months in advance trips longer than 3 days and/or trips with per student cost greater than \$500.00

Please TYPE or use COMPUTER FORM

- Name of Teacher(s): David Green, Abigail Buffum, Sam McHale, Alec Lewis
- School: ABRHS
- # of Students going: ~30-35 # of Chaperones (gender): 3 male, 1 female

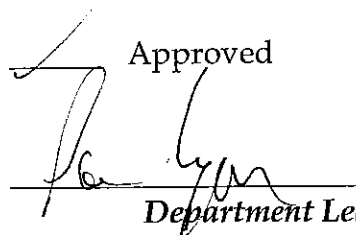
Names of Chaperones: David Green, Abigail Buffum, Sam McHale, Alec Lewis

- Date(s) of Trip: 4/11/2013 - 4/22/2013 School Time Involved: 4/11/2013-4/12/2013
 - Purpose of Trip/Destination: Service learning trip to Peru
 - Have you taken this trip before? No
 - Any special arrangements required (such as extra insurance, ADA accommodations)? No
 - Cost per Student: We have worked very hard to reduce the cost/student to ~\$3500 as of this month, which will include international airfare, lodging, transportation, and most meals - we are asking students to budget another \$200 for souvenirs, tips, and other unexpected expenses
 - Who will pay for the trip? The cost of the trip will be borne by the students and their families
 - Has any fundraising been done? No If so, what? _____
-

- Are any parents driving? N/A



If so, have appropriate insurance forms been filled out? N/A

- Have you followed the procedure outlined in Policy IJOA? Yes
- Other comments:

☒ Approved ☐ Not Approved


Department Leader

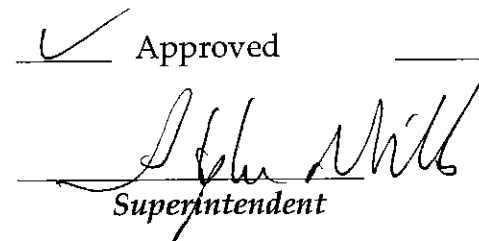
Date


☒ Approved ☐ Not Approved


Principal

2/24/2012

Date

☒ Approved ☐ Not Approved


Superintendent

2/24/02

Date

☐ Approved ☐ Not Approved

School Committee

Date

To: Members of the Acton and Boxborough School Committee
Re: Proposed trip to Peru, April 2013

To Whom it May Concern,

Four members of the social studies department at ABRHS [David Green, Abigail Buffum, Sam McHale, and Alec Lewis] are proposing a student trip to Peru for April 2013. This opportunity, enabled by the travel company EF [Education First], offers an especially unique opportunity for students to explore an increasingly popular, important, yet understudied part of the world. All four chaperones have extensively traveled and lived abroad and recognize the critical role that travel plays in helping kids understand the world around them. The maturity, perspective, and skills acquired as a result of trips like this are impossible to replicate in the classroom, and thus we feel especially passionate about sharing this experience with our students. Beyond the required forms, we wanted to take a moment to summarize in writing our goals and reasons for proposing the trip. At least one of us will be at the school committee meeting in March to field questions should any come up. We very much appreciate your consideration.

As Latin America is an enormously significant part of the world and yet underrepresented in our district's coursework, many of us feel strongly that students would benefit greatly from firsthand exposure. Peru offers wonderful opportunities for safe, cost-effective, and extraordinarily interesting travel. This trip is intended for next year's ABRHS seniors and will allow them to integrate many of the skills, curricula, and values of their experience at AB. While tourism is certainly important, this trip's itinerary [which we are largely constructing ourselves with the support of the company] will also feature community service learning, evaluation of Peru's vast ecosystems, and purposeful connections to our department's coursework. EF, one of the oldest travel companies in the United States, is working very closely with us to pilot a new community service learning project in Peru. For students, this is an unprecedented chance to create a program that bears their personal stamp, so to speak. Rather than "parachute" Americans into a town to paint the wall of a school or build latrines for a day and then leave just as quickly, students will take time to interact with a local community to assess need, sustainability, and viability of community service. Hopefully, this will allow ABRHS to form and maintain a relationship with this community for potential future groups to nurture and expand.

Peru provides a significant opportunity for Acton Boxborough Regional High School students to enhance and broaden their understanding of the historic themes and contemporary issues within the Social Studies curriculum. Our visits to Cuzco and Machu Picchu will re-expose students to the culture and religion of the Inca Empire, one of the significant pre-Columbian societies featured in the World History I curriculum. Our examination of colonial Peru through our time at the Archbishop's Palace and the San


Francisco Monastery in Lima (the colonial capital of Peru) will reinforce an essential part of each of our core history courses at the high school: the interactions between Western and non-Western peoples and its consequences for today's global society. Our exploration of the Amazon rainforest will allow students take in one of the most biologically diverse areas on the planet and encourage them to connect their understanding of environmental sustainability (from their Biology and Environmental Science courses) with their understanding of the demands of global consumption in the past and present (from their Social studies courses). EF's trip both reinforces and expands on the themes of the AB Social Studies curriculum and connects these themes to understanding acquired in other AB departments' courses, providing a powerful and unique opportunity for our students to continue their learning.

Logistically, we have approached this trip with safety and cost-effectiveness as our top priorities. Peru has become one of the most touristed non-European countries in the world. Its infrastructure is travel friendly for all ages and will enable us to cover a lot of ground efficiently and comfortably without breaking the bank. EF has offices and representatives in Lima and offers safety and insurance protocols that would make us comfortable sending our own children. Perhaps most compellingly, EF hopes to send its director of education on this trip with us. Because of the unique community service element of the proposed itinerary, they are hoping to use this as a model for future experiences and thus want one of their top people to be there too. We view this as an enormous benefit, as the company itself has more at stake than just its profit.

The trip cost, about \$3500, is extremely reasonable considering the breadth and scope of the experience. While not a trivial sum of money, there is no way someone could go to Peru independently and do what we hope to do for less. We have been very clear with EF that Acton-Boxborough families have been hit hard by the economy, so they have worked with us to build an efficient and sensible itinerary.

David and Abigail began traveling with students over ten years ago. Over that time, many of those students continue to write to us or visit with stories of how those experiences transformed them. In some cases, students made large life and career decisions on the basis of those travels. For us, it is some of the most meaningful time we have spent as educators. Thank you for considering our proposal.

Sincerely,


David M. Green

ENROLLMENT

Any child who will be 3 or 4 by September 1, 2012 is eligible to enroll in the program. Priority will be given to all preschoolers who are children, grandchildren or foster children of staff and faculty in the regional and local districts. Enrollment begins January 4, 2012 for the 2012-2013 school year. An enrollment lottery will be held on February 15, 2012. After February 15th, if spaces are available, they will be open to preschoolers who are not dependents of employees of the school districts. Students enrolled full time as three year olds will have priority enrollment for their second year (2013-2014). The curriculum is designed around full time enrollment, part time students will be enrolled on a per-case basis.



HOURS OF OPERATION

We will follow the district calendar and will be open every full school day from 7 AM to 4 PM. The preschool will be open 182 school days to accommodate the staff day prior to the beginning of school as well as the district wide professional development day.

ABRHS CHILD DEVELOPMENT PRESCHOOL

Located in the Acton Boxborough
Regional High School
Rooms 180W & 182W
36 Charter Road
Acton, MA
Phone (978) 264-4700 Ext. 3428
dalesbury@abschools.org

ABRHS CHILD DEVELOPMENT PRESCHOOL

2012-2013



*A full school day preschool located
in the Acton Boxborough Regional
High School as part of the Child
Development Program at ABRHS*

STAFFING

Our adult staff of experienced early childhood educators includes a Massachusetts Department of Education Early Childhood (PreK-2) certified teacher. Two adult teachers will be with the students throughout their day.

In addition, ABRHS Child Development students will be scheduled during the high school day (7:23 AM-2:18 PM) as part of their practicum experience. Each high school student will be current or former students of the Child Development Theory class. Many of the high school assistants are juniors and seniors with an interest in completing the requirements for their Massachusetts Department of Early Education and Care Level 1 Certification.

CURRICULUM & ACTIVITIES

Our activities are structured to address all developmental domains and focus on social interactions skills. Our learning activities will include nature and environmental studies as well as community service initiatives. In addition to the adjoining playground, we will explore nearby nature trails and outdoor classrooms. We follow the Early Childhood Advisory Council guidelines for preschool learning experiences in creating our curriculum.

We have access to high school staff and facilities which enable our preschoolers to enjoy various high school programs throughout the school year. This includes coordination of activities with high school faculty and students in areas such as the science gardens, TV studio, gymnasium, cafeteria, and auditorium. Additional events will be introduced throughout the year to continue to make connections within the high school curriculum of all departments, after school activities, and other schools within the districts.

TUITION COSTS

Full time enrollment (8 hrs/day) will be payable in 10 monthly installments of \$1,250 for employees of the school districts. Tuition is due one month in advance beginning August 1, 2012. A payment of \$350 will be due with initial registration (this nonrefundable deposit will be applied to the last month of school tuition due May 1, 2013). All checks should be made payable to: Acton Boxborough Regional School District



Together we promote respect for self, others, and learning.

***For more information,
registration materials, or
to arrange a visit, please
contact Debra Alesbury***

***ABRHS Child
Development Teacher***

at 978-264-4700

ext. 3428 or email

dalesbury@abschools.org

Child Development Preschool

at Acton Boxborough Regional High School

Tuition Schedule

2012-2013

8 hour days

	Full Time	4 days/wk	3 days/wk	2 days/wk
Annual rate	11,500	9,500	7,250	5,000
Monthly rate	1,150	950	725	500

Enrollment must be submitted by Feb 15th, 2012

*\$350 deposit paid at time of enrollment will be applied to the last month's tuition payment
(May 1st, 2013)*

Tuition payments due one month in advance, e.g., first tuition due August 1st, 2012

To: Steve Mills, Superintendent
AB Regional School Committee
From: Alixe Callen, Principal ABRHS
Re: Concussion Data
Date: February 27, 2012

Please see below for data regarding the numbers of concussions suffered by our students thus far in 2011-2012.

Alpine Ski	2
Basketball(Girls)	2
Ice Hockey(Boys)	5
Ice Hockey(Girls)	2
Field Hockey	1
Football	7
Gymnastics	1
Soccer(Boys)	1
Soccer(Girls)	2
Swim(Boys)	1
Wrestling	1

Physical Education Class 1

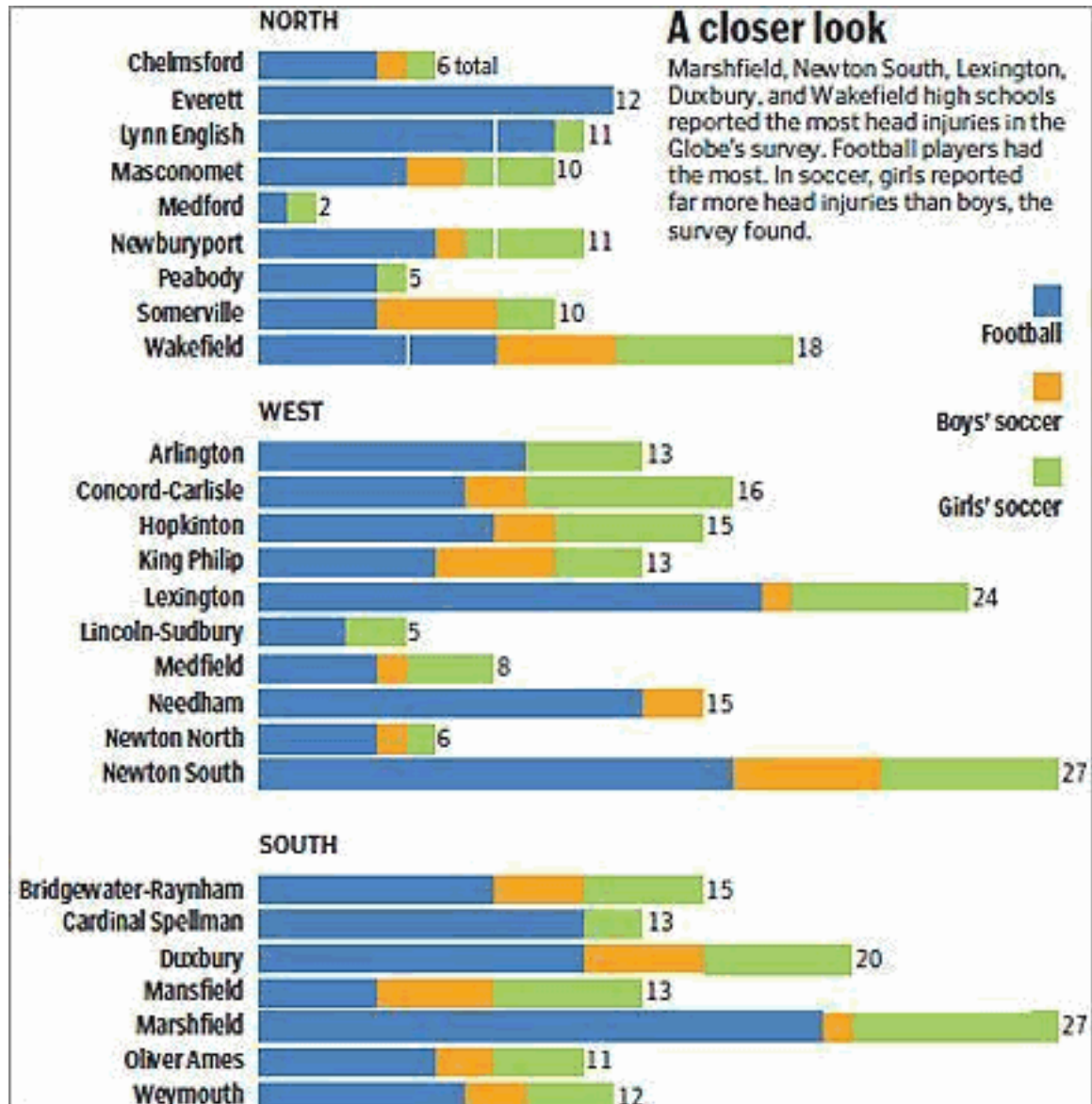
TOTAL 26

The recent *Boston Globe* article on concussions at area schools looked only at concussions suffered during football, girls soccer, and boys soccer. The total number of concussions suffered by our student athletes in those sports was 10.

If you have further questions, please do not hesitate to be in touch.

Knowing the Score on Concussions

By Lisa Kocian Globe Staff
Boston Globe West 2/19/12
Page 1





R. J. GREY GRADE 7 STUDENTS & FAMILIES

Wednesday, March 21, 2012

8:00 a.m. to 2:20 p.m.

MERRIMACK COLLEGE

What is Project Wellness?

Project Wellness is a day-long conference where all 7th-grade students and one adult family member attend workshops together on topics related to the tough issues faced by adolescents and families. This important program promotes communication and trust between our students and adults, focuses on a healthy lifestyle for families, and supports the positive self-esteem of students.

Project Wellness has two goals:

1. To help parents and teenagers recognize the variety of issues faced by today's families;
2. To develop, maintain, or improve adult-teenager open communication.

All 7th-grade students are expected to attend this conference, as it is a regularly scheduled school day. It is also our expectation that each student will be accompanied by an adult family member.

Why should we attend Project Wellness?

Project Wellness was created as a comprehensive response to the alarming results of the Emerson Youth Risk Behavior Surveys (YRBS). According to these surveys, our students are engaging in unsafe behavior. Research shows clearly that open communication with adults significantly reduces adolescents' risk for becoming involved in risky behaviors.

Project Wellness goes beyond encouraging open communication by also providing information and skills that facilitate communication and empower families with knowledge. It is difficult to know everything about the challenges that our students face, and this event is not built on the premise that our families have problems or cannot handle these challenges. Rather, Project Wellness is an opportunity to absorb new information, to share ideas with other families, and to spend a day focusing on our children.

According to the 2008 Acton-Boxborough Youth Risk Behavior Survey

- Nearly 10% of eighth-grade respondents report having had sexual intercourse.
- 9.4% of eighth-grade respondents report having used alcohol during the previous month.
- 12% of eighth-grade respondents report having seriously considered attempting suicide during the twelve months prior to the survey.
- 14.2% of eighth-grade respondents report having hurt themselves on purpose (by cutting, burning, or bruising, for example) on at least one occasion during the previous twelve months.

ELL STUDENT POPULATION
Acton-Boxborough Regional School District
February 1, 2012

Category	Total as of 1/1/2011	Additions	Subtractions	Current Total as of 2/1/2012
RJG JHS	10	0	0	10
ABRHS	11	0	0	11
ABRSD TOTALS	21	0	0	21

8.4

02/27/2012 15:46 | ACTON / BOXBOROUGH REGIONAL SCHOOLS
dkelly | FY12 YTD EXPENSE SUMMARY

| PG 1
| glytbdud

FEBRUARY 27, 2012

FOR 2012 99

	ORIGINAL APPROP	TRANFRS/ ADJUSTMTS	REVISED BUDGET	YTD EXPENDED	RNC/REQ	AVAILABLE BUDGET	PCT USED

1000 GENERAL FUND							

01 SALARIES, TEACHING	16,006,402	131,000	16,137,402	8,444,745.10	7,668,960.73	23,696.17	99.9%
02 SALARIES, PRINCIPALS	741,686	0	741,686	493,095.20	263,950.80	-15,360.00	102.1%
03 SALARIES, CNTRL ADMN	421,151	0	421,151	282,920.05	151,444.12	-13,213.17	103.1%
04 SALARIES, SUPP STAFF	2,940,641	0	2,940,641	1,797,382.44	1,135,786.80	7,471.76	99.7%
05 SALARIES, ATHLETICS	415,167	0	415,167	274,903.92	92,241.50	48,021.58	88.4%
06 SALARIES, BUILDINGS	280,104	0	280,104	229,275.90	75,831.53	-25,003.43	108.9%
07 SALARIES, CUSTODIAL	798,215	0	798,215	477,149.42	235,595.08	85,470.50	89.3%
08 SALARIES, HOME INSTR	7,133	25,000	32,133	15,332.55	.00	16,800.45	47.7%
09 SALARIES, SOBS	252,793	0	252,793	188,370.40	2,267.85	62,154.75	75.4%
10 FRINGES, COURSE REIM	28,000	0	28,000	25,960.00	.00	2,040.00	92.7%
11 FRINGES, HLTH INSUR	5,213,338	-89,000	5,124,338	3,683,613.35	.00	1,440,724.65	71.9%
12 FRINGES, OTHR RE INS	26,110	0	26,110	12,040.09	.00	14,069.91	46.1%
13 FRINGES, UNEMPLYMNT	27,000	0	27,000	49,159.68	.00	-22,159.68	182.1%
14 FRINGES, WORKERS COMP	90,000	0	90,000	107,108.45	.00	-17,108.45	119.0%
15 FRINGES, PENSION	938,823	0	938,823	929,255.63	.00	9,567.37	99.0%
16 INSTRUCT SUPPLIES	252,892	0	252,892	131,558.56	23,038.05	98,295.39	61.1%
17 INSTRUCT TEXTBOOKS	135,167	0	135,167	60,321.60	9,574.23	65,271.17	51.7%
18 INSTRUCTIONAL, LBY	29,724	0	29,724	17,083.31	3,670.83	8,969.86	69.8%
19 OTHER, CAP OUTLAY	317,206	0	317,206	141,928.48	7,896.40	167,381.12	47.2%
21 OTHER, DEBT SERVICE	1,887,984	0	1,887,984	1,796,535.65	.00	91,448.35	95.2%
22 OTHER, PROP/CASUALTY	100,865	0	100,865	63,968.00	.00	36,897.00	63.4%
23 OTHER, MAINT BLDG/GR	359,880	0	359,880	237,513.27	25,766.37	96,600.36	73.2%
24 OTHER, MAINT EQUIP	200,242	0	200,242	140,853.47	25,830.57	33,557.96	83.2%
26 OTHER, LEGAL SERVICE	102,776	0	102,776	61,418.76	11,756.84	29,600.40	71.2%
27 OTHER, ADMIN SUPP	584,087	-6,000	578,087	361,339.39	80,885.46	135,862.15	76.5%
28 OTHER, ATHLETIC SUPP	62,885	0	62,885	55,758.43	1,854.49	5,272.08	91.6%
29 OTHER, CUSTODL SUPP	72,409	0	72,409	73,347.17	.00	-938.17	101.3%
30 OTHER, SPED TRANSP	788,332	0	788,332	777,778.77	.00	10,553.23	98.7%
31 OTHER, STUDENT TRANS	643,012	0	643,012	434,562.94	103,033.47	105,415.59	83.6%
32 OTHER, TRAVEL	26,313	0	26,313	14,526.92	1,281.30	10,504.78	60.1%
33 OTHER, SPED TUITION/	3,236,257	0	3,236,257	1,716,679.12	1,528,500.42	-8,922.54	100.3%
34 OTHER, UTILITIES	1,285,751	-61,000	1,224,751	587,615.23	.00	637,135.77	48.0%
35 OTHER, SEWER	230,006	0	230,006	186,049.70	30,535.50	13,420.80	94.2%
TOTAL GENERAL FUND	38,502,351	0	38,502,351	23,869,150.95	11,479,702.34	3,153,497.71	91.8%
GRAND TOTAL	38,502,351	0	38,502,351	23,869,150.95	11,479,702.34	3,153,497.71	91.8%

** END OF REPORT - Generated by Denise Kelly **

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02/27/2012 15:46 |ACTON / BOKBOROUGH REGIONAL SCHOOLS
dkelly |FY12 YTD SPED PROGRAMS

|PG 1
|glytdbud

FEBRUARY 27, 2012

FOR 2012 99

	ORIGINAL APPROP	TRANSFRS/ ADJUSTMTS	REVISED BUDGET	YTD EXPENDED	ENC/REQ	AVAILABLE BUDGET	PCT USED

1000 GENERAL FUND							

07 SPECIAL EDUCATION							

05040701 51404 SPED DIRECTOR	47,900	0	47,900	31,233.93	15,719.47	-53.40	100.1%
05040702 51502 PUPIL SVC SECRETARY	52,806	0	52,806	34,199.08	17,979.36	627.56	98.8%
05050701 52430 SPED TRANSPORTATION	765,052	0	765,052	765,052.00	.00	.00	100.0%
05050702 51502 SPED SECRETARY	1,499	0	1,499	2,291.52	.00	-792.52	152.9%
05050703 52402 SPED TRAVEL	3,500	0	3,500	2,082.92	.00	1,417.08	59.5%
05050703 52406 SPED POSTAGE	8,000	0	8,000	1,139.15	6,860.85	.00	100.0%
05050703 52410 SPED DUES AND FEES	298	0	298	348.00	.00	-50.00	116.8%
05050704 51630 SPED SUMMER ASST	1,426	0	1,426	263.62	.00	1,162.38	18.5%
05050705 51424 SPED HOME INSTR	7,133	25,000	32,133	15,332.55	.00	16,800.45	47.7%
05050706 51409 TEACHER REFERRAL PR	50,000	31,153	81,153	37,818.42	1,500.00	41,834.92	48.4%
05050706 52443 REFER TO SPECIALIST	86,862	0	86,862	98,655.93	171,280.87	-183,074.80	310.8%
05050707 52409 SPED CONFERENCES	358	0	358	485.00	.00	-127.00	135.5%
05050708 54301 SPED OFFICE SUPPLIE	1,586	0	1,586	1,586.48	.00	-.48	100.0%
05050709 58708 O/L INSTRUCT EQUIP	23,312	0	23,312	15,172.95	2,030.80	6,108.25	73.8%
05050710 52413 SPED MEDICAL SVCS	968	0	968	232.32	735.68	.00	100.0%
05050711 52484 SPED INDEP EVALUATI	3,873	0	3,873	2,500.00	5,123.00	-3,750.00	196.8%
05050713 52426 SPED PRIVATE DAY TU	1,930,305	-141,689	1,788,616	263,893.58	834,217.46	690,504.96	61.4%
05050713 52428 SPED RESIDENTIAL TU	517,464	-164,452	353,012	159,081.70	193,930.48	.00	100.0%
05050713 52468 CIRCUIT BREAKER TUI	-711,761	141,689	-570,072	.00	.00	-570,072.00	.0%
05050714 52425 CASE SPED COLLAB TU	892,719	0	892,719	948,719.00	.00	-56,000.00	106.3%
05050715 52401 SPED LEGAL SERVICES	52,776	0	52,776	18,243.16	6,756.84	27,776.00	47.4%
05050716 52470 SPED OFF EQUIP MNT	968	0	968	776.40	191.60	.00	100.0%
05050717 52471 SPED COPY EQUIP MNT	3,873	0	3,873	2,778.18	1,337.82	-243.00	106.3%
05050718 51646 SPED MEDICAL AIDE	23,280	0	23,280	12,726.77	.00	10,553.23	54.7%
05050719 52443 HOME TUTOR C/S	42,479	-25,000	17,479	6,216.19	1,823.81	9,439.00	46.0%
14040701 51411 SPED CHAIRPERSON	94,760	0	94,760	61,721.05	33,038.95	.00	100.0%
14040702 51409 SPED OUT OF DISTR S	65,139	0	65,139	42,427.41	22,711.09	.50	100.0%
14040702 51416 OCCUPATIONAL THERAP	63,204	0	63,204	37,881.45	25,322.89	-.34	100.0%
14040702 51417 PHYSICAL THERAPIST	32,419	0	32,419	16,209.44	16,209.56	.00	100.0%
14050701 51433 SPED SUMMER PROG SP	72,750	-31,153	41,597	41,596.66	.00	.00	100.0%
14050702 52443 SPED ADAPTIVE PHYS	7,130	0	7,130	.00	.00	7,130.00	.0%
14050703 52425 SPED OTHER COLLAB T	600,000	164,452	764,452	340,008.89	500,352.48	-75,909.55	109.9%
14050704 52402 OUT OF DISTRICT CAR	485	0	485	.00	.00	485.00	.0%
14050704 52407 TRANSLATION	10,000	0	10,000	4,049.44	10,650.56	-4,700.00	147.0%
14050705 51602 SPED ADAPTIVE PHYS	116	0	116	.00	.00	116.00	.0%

TOTAL SPECIAL EDUCATION	4,752,679	0	4,752,679	2,964,723.19	1,868,773.57	-80,817.76	101.7%

28 SPECIAL EDUCATION/JH/SH

02/27/2012 15:46 |ACTON / BOXBOROUGH REGIONAL SCHOOLS
dkelly |FY12 YTD SPED PROGRAMS

|PG 2
|glytdbud

FEBRUARY 27, 2012

FOR 2012 99

	ORIGINAL APPROP	TRANSFRS/ ADJUSTMTS	REVISED BUDGET	YTD EXPENDED	ENC/REQ	AVAILABLE BUDGET	PCT USED
14052801 58708 INSTRUCTIONAL EQUIP	86	0	86	.00	.00	86.00	.0%
15042801 51425 PSYCHOLOGIST	210,967	75,000	285,967	134,238.52	134,238.48	17,490.00	93.9%
15042802 51408 SPED TEACHER	625,395	0	625,395	297,583.93	277,431.92	50,379.15	91.9%
15042803 51409 SPEECH/LANG TEACHER	86,377	0	86,377	53,471.47	32,905.53	.00	100.0%
15042804 51624 SPED EDUCATION ASST	177,566	0	177,566	81,689.06	55,169.68	40,707.26	77.1%
15052801 52417 SPED EVAL AND TRAIN	660	0	660	730.00	120.00	-190.00	128.8%
15052802 54305 SPED TEXTBOOKS	1,269	0	1,269	.00	210.00	1,059.00	16.5%
15052802 54334 SPEECH TEXTS	494	0	494	203.70	72.94	217.36	56.0%
15052803 54302 SPED EDUCATIONAL SU	1,254	0	1,254	1,253.71	.00	.29	100.0%
16042801 51425 PSYCHOLOGIST	162,986	0	162,986	77,564.50	77,564.50	7,857.00	95.2%
16042802 51408 SPED TEACHER	440,578	75,000	515,578	262,566.87	262,566.90	-9,555.77	101.9%
16042803 51408 SPEECH/LANG TEACHER	113,817	0	113,817	60,340.41	53,476.59	.00	100.0%
16042804 51624 SPED EDUCATION ASST	230,266	0	230,266	130,714.23	95,845.44	3,706.33	98.4%
16052801 54305 SPED TEXTBOOKS	1,325	0	1,325	1,409.80	.00	-84.80	106.4%
16052801 54334 SPEECH TEXTBOOKS	497	0	497	258.51	37.99	200.50	59.7%
16052802 54302 SPED EDUC SUPPLIES	1,098	0	1,098	1,782.78	.00	-684.78	162.4%
TOTAL SPECIAL EDUCATION/JH/SH	2,054,635	150,000	2,204,635	1,103,807.49	989,639.97	111,187.54	95.0%
TOTAL GENERAL FUND	6,807,314	150,000	6,957,314	4,068,530.68	2,858,413.54	30,369.78	99.6%
TOTAL EXPENSES	6,807,314	150,000	6,957,314	4,068,530.68	2,858,413.54	30,369.78	
GRAND TOTAL	6,807,314	150,000	6,957,314	4,068,530.68	2,858,413.54	30,369.78	99.6%

** END OF REPORT - Generated by Denise Kelly **

MONTHLY ENROLLMENT
ACTON PUBLIC SCHOOLS
ACTON-BOXBOROUGH REGIONAL SCHOOLS
2011-2012 ACADEMIC YEAR

Feb-12

Levels	Sept. 1			Oct. 1			Nov. 1			Dec. 1			Jan. 1			Feb. 1			Mar. 1			Apr. 1			May 1			Jun 1				
	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot	A	B(1)	C	Tot				
K	297	59	5	302	294	59	7	301	293	58	7	300	292	58	7	299	295	56	7	302	294	58	7	301	0	0	0	0	0			
1	333	53	5	338	333	53	8	341	334	51	8	342	334	52	8	342	337	52	8	345	337	52	8	345	0	0	0	0	0			
2	355	54	7	362	354	54	7	361	355	54	7	362	355	54	7	362	359	54	7	366	359	54	7	366	0	0	0	0	0			
3	351	68	2	353	351	68	2	353	352	67	2	354	353	66	2	355	353	66	2	355	354	66	2	356	0	0	0	0	0			
4	351	66	2	353	351	66	2	353	355	66	2	357	354	66	2	356	355	68	2	357	355	68	2	357	0	0	0	0	0			
5	370	75	5	375	369	75	5	374	371	75	5	376	372	75	5	377	376	77	5	381	376	77	5	381	0	0	0	0	0			
6	359	85	4	363	361	84	4	365	361	84	4	365	362	84	4	366	363	84	4	368	364	84	4	368	0	0	0	0	0			
K-6 Ungr.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
In D.Pre-sch.	37	6	0	37	38	8	0	38	42	8	0	42	46	8	0	46	50	9	0	50	52	10	0	52	0	0	0	0	0	0		
O.D. Pre-sch.	2	0	0	2	2	3	0	2	2	3	0	2	2	3	0	2	2	3	0	2	2	3	0	2	0	0	0	0	0	0		
O.D. SPED K-6	12	4	0	12	13	4	0	13	13	4	0	13	13	4	0	13	13	5	0	13	13	5	0	13	0	0	0	0	0	0		
A.P.S. Total	2467	472	30	2497	2466	474	35	2501	2478	470	35	2513	2483	470	35	2518	2504	474	35	2539	2506	477	35	2541	0	0	0	0	0	0		
7	391	71	7	469	391	71	7	469	390	71	7	468	390	72	7	469	389	72	7	468	389	72	7	468	0	0	0	0	0	0		
8	404	71	9	484	408	71	9	488	409	71	9	489	409	71	9	489	409	71	9	489	409	71	9	489	0	0	0	0	0	0		
J.H.S. Total	795	142	16	953	799	142	16	957	799	142	16	957	799	143	16	958	798	143	16	957	798	143	16	957	0	0	0	0	0	0		
9	394	77	8	479	385	78	8	471	388	78	8	474	388	78	7	473	385	78	7	470	385	78	7	470	0	0	0	0	0	0		
10	414	108	3	525	415	109	3	527	415	109	3	528	416	109	3	528	416	108	3	496	415	108	3	526	0	0	0	0	0	0		
11	387	100	7	494	387	99	7	493	386	99	7	492	386	99	7	492	385	99	7	522	385	99	6	490	0	0	0	0	0	0		
12	362	94	9	465	361	96	7	464	362	96	7	465	362	96	7	465	362	95	7	487	362	94	6	462	0	0	0	0	0	0		
9-12 Ungr.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
P.G.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
H.S. Total	1557	379	27	1963	1548	382	25	1955	1551	382	25	1958	1552	382	24	1958	1548	380	24	1975	1547	379	22	1948	0	0	0	0	0	0	0	
Total JHS & HS	2352	521	43	2916	2347	524	41	2912	2350	524	41	2915	2351	525	40	2916	2346	523	40	2909	2345	522	38	2905	0	0	0	0	0	0	0	
O.D. SPED 7-12	44	13	0	57	44	12	0	56	43	12	0	55	43	12	0	55	43	13	0	56	43	13	0	56	0	0	0	0	0	0	0	
Reg. Total	2396	534	43	2973	2391	536	41	2968	2393	536	41	2970	2394	537	40	2971	2389	536	40	2965	2388	535	38	2961	0	0	0	0	0	0	0	
A.P.S. Total	2467	472	30	2497	2466	474	35	2501	2478	470	35	2513	2483	470	35	2518	2504	474	35	2539	2506	477	35	2541	0	0	0	0	0	0	0	
Reg. Total	2396	534	43	2973	2391	536	41	2968	2393	536	41	2970	2394	537	40	2971	2389	536	40	2965	2388	535	38	2961	0	0	0	0	0	0	0	0
Grand Total	4863	534	73	5470	4857	536	76	5469	4871	536	76	5483	4877	537	75	5489	4893	536	75	5504	4894	535	73	5502	0	0	0	0	0	0	0	0

All Principals (2)

C. Bates

D. Aicardi

S. Mills

Distribution:

In D. = In District

Pre-School = SPED
P.G. = Post Graduates
Ungr. = Ungraded
O.D. = SPED Out of District

A = ACTON
B = BOXBOROUGH
C = Choice/Staff/Tuition In

A. Bisewicz

M. Altieri

D. Bookis

L. Huber

Students other than Choice counted under column C:
Staff Students -
Tuition In Students -
Sped Tuition in Students

8.5

**Actual
Acton Public Schools
2011 - 2012
February 1, 2012**

*# Staff Children
Case []
CAD, DAD, GAD, TAD, and MAD - ALL DAY PROGRAMS*

Staff Children
Case []

**Actual
Acton Public Schools
2011 - 2012
February 1, 2012**

*# Staff Children
Case []
CAD, DAD, GAD, TAD, and MAD - ALL DAY PROGRAMS*

Staff Children
Case [][illegible]



Presenting....

The Plan

Tuesday, March 6th at 7pm
Town Hall

- Come learn more about what the future holds for Acton. On March 6th, Acton 2020 will be presenting what represents the culmination of several years of hard work, including thousands of volunteer hours as well as thousands of community members like you providing valuable inspiration, ideas, and feedback. This is your opportunity to hear about the comprehensive community plan for Acton in full detail.
- For a sneak preview, check out a two-page highlights or a brief executive summary of the plan.
- The full plan is now open for public comment at our website at www.acton2020.info. The public comment period will close on March 12, 2012 so that the plan can be finalized in preparation for Town Meeting, where Acton citizens will have the opportunity to approve the plan. Hard copies of the plan can be found at Acton Memorial Library, West Acton Citizens' Library, Acton Senior Center, and Town Hall. Any written comments on the plan can be submitted to the Planning Department at Town Hall.
- Finally, Acton 2020 is holding an **art contest for youths ages 6 to 21**, the winners of which will have their artwork displayed at the March 6th meeting as well as have it published in the plan! [Click here for more details.](#)

Acton 2020 Committee
Margaret Woolley Busse, Chair


From: Ann Sussman
 To: Acton and Acton-Boxborough Regional School Committees
 Sent: Sunday, February 26, 2012 9:46 AM
 Subject: Governance

After the 2020 meeting earlier this month, where the issue of governance was raised, I did cast an eye on how other towns work. Generally open town meeting is for small towns; legally towns may move to representative town meeting once they're over 6,000; it appears most larger ones with top schools systems + real estate valuations have, including Belmont, Brookline, Dedham, Winchester, Lexington, Amherst. Towns over 12,000 may have mayors.

My quick report summarized:

1. Acton has a city-sized high school larger than ones in most Commonwealth cities; in 2010-2011 AB was the 13th largest high in the state. (DOE stats) Effectively all high schools of Acton size or larger and many smaller are in communities run by mayors; the one outstanding exception is Lexington, same size as AB, w Rep town meeting since 1929 and elected planning board. AB is the state's largest 2-town regional; it has 600 more kids than Concord-Carlisle.
2. Acton is the only town of the 351 municipalities in the Commonwealth that retains Open Town Meeting at its pop over 20,000 with a city-sized high school; most towns with open town meeting have some 10,000 and many fewer; there are 7 towns in the Commonwealth with open town meeting with population of 21 -29,000; however their student responsibility is small - about 950 kids in high on average; N. Andover tops out the list at 28,000 pop with high school of 1371.
3. Acton is the only town of the 351 with unelected planning board given its population + student responsibility, let alone its potential for further build-out (27,000 by 2040?). Lexington, Burlington, Stow, Weston, Sudbury, Westford etc all have elected PB as do most inner ring towns;
4. Acton is the only town over 17, 000 people of the 351 in the Commonwealth where BoS retain commercial site plan permit authority as opposed to the Planning Board; under chapter 81a, the BoS having planning authority is designed for small towns who don't have PBs; I found only three who still use it including Great Barrington, pop 7000 and Sudbury (pop 17,000) who has an elected planning board for residential which most impacts schools - and no others. (note: Lincoln Sudbury Regional at 1600 students)
5. Acton may be the only town in the Commonwealth experiencing a demographic shift where as many as 25% or perhaps more of parents of incoming school kids can't vote because they aren't citizens; open town meeting precludes their participation + precludes their having representation.

Thank you for considering these thoughts.

From: [REDACTED] <[REDACTED]@[REDACTED].n> Thursday, February 16, 2012 5:47:14 PM 

Subject: Regionalization Input

To: [REDACTED] <copp@verizon.net> [REDACTED] <apsc@acton-ma.gov>

Cc: [REDACTED] <[REDACTED]@[REDACTED].I>

Attachments: [REDACTED] Attach0.html 15K

Dear Chairman Copponilo and the School Committee:

We are the parents of a 5th grader and 2nd grader at Gates, and we have an infant, so we take the long view. We have been residents of Acton for more than 12 years, and both work full time with considerable commutes to [REDACTED] and [REDACTED] (for jobs that relocated us further from Acton after we purchased our home).

We believe that the Town of Acton has a unique opportunity to evaluate our entire elementary school program as part of the Acton Public School and Blanchard School regionalization consideration. Should we elect to merge our school district with Boxborough, we would like to see that the best management practices of both districts are considered and adopted; while less effective programs and practices are eliminated. For example, Blanchard is a very appealing option due to the small class sizes and higher SPED ratio, as documented by Blanchard in their assessment. Please follow this link to Blanchard assessment under the reports and documents section:

<http://www.boxboroughschool.org/reports>

The file is entitled "regionalization and job sharing presentation"; please see slides 33-34 for elementary school comparisons.

Ideally, these positive attributes should be retained and adopted for the regionalized school district.

Another key area for consideration is the school schedule. The current half-day Thursday is a tremendous burden to working parents, both in terms of scheduling for child care and commuting/work demands, but also the exorbitant cost of childcare during this time. Students also find it frustrating, as their day is either crammed or inefficient, sometimes amounting to a less productive day where everyone is dismissive of "Half-Day Thursday". We often hear that Wednesdays are exhausting because all of the important work of that can't be done on Thursday is moved up a day, allowing for spelling tests and other week-ending tasks to be completed on Fridays. Why not just have a fixed daily schedule every day? Same start time, same dismissal time, allowing for a bigger block of time for educational content on Thursdays.

Recognizing the need for blocks of time for teacher training, perhaps one half-day per month could be designated? It is our understanding that this is the current schedule at Blanchard and it is highly effective to provide a regularly scheduled Professional Development (PD) time block, without overtaxing families with the cost of half day child care. Or even a few specific days distributed throughout the school year? Ideally, a Monday or Friday might be utilized, likely an easier day to accommodate work schedule changes typical of bank holidays, and parents may be off from work and/or need to travel for the weekend on a Friday. Perhaps most significantly, energy efficiency savings can be garnered by a shortened building heating, lighting and operations schedule. We understand that many of the PD courses that are offered on Thursday afternoons are optional; and therefore, not everyone attends. Ideally, PD courses should be well attended if the school district has expended resources to host these classes. We also understand that special education training is not mandatory for all teachers and we submit that it should be, as ~22% of our students are on Individualized Education Plans (IEPs). This would be a constructive use of the PD training time and budget; while aiding all

students who would benefit from the supplemental special education training and strategies imparted to teachers to implement in their classrooms.

Several scheduling issues beyond the half-day Thursday pose challenges to working parents. The annual switch from the "early schedule" to the "late schedule" is burdensome and expensive regarding childcare time and costs, as well as the impact to commuting and work schedules. Some families may also prefer one schedule over the other due to other needs of their family, such as a family of early risers electing a school with an earlier start time, or one with long commute times that need more time at the end of the day for family time, or perhaps for music lessons or sports activities. If we truly have school choice, scheduling is a major criteria in a family's decision making process regarding the best school for their child(ren). Similarly, the half-day kindergarten sections that start in the fall in the afternoon are severely shortchanged for that semester. They have no classes on Thursday (again a scheduling and childcare burden to parents), but more importantly, they miss various school programs and functions (most acutely - being in a small group for their Medieval Feast, Activity Day and the Halloween Parade, separate from the rest of the school). These are important milestones for a kindergartener and their parents. The January switch from AM to PM and vice versa is also part of the same difficulty.

It should be noted that the current schedule with Extended Day and the All Day Kindergarten program requires full payment for half day Thursdays, resulting in two payments...one for the second half of the half day for \$410/month, as well as the cost of Extended Day for the full session (although the student isn't there until after dismissal). One year this combination cost us ~\$16K, and that was just for 2 days after school (Tuesday and Thursday). One neighbor spent \$25K for after school care several days per week.

A lesser concern, but also part of the school schedule, are the 2-3 early dismissal days for school conferences. This also requires special arrangements for child care, particularly while both parents are scheduled to be at their child's conference. Perhaps conferences could be held at night when a sitter can be more readily obtained, either a high school student or a neighbor? Or during the school day while the Teaching Assistant is managing the classroom? Or while the students are at a "Specials" class, such as Art or Gym? And if it must be while the students are out of school, perhaps conferences could be scheduled during the half-day Thursday when they are already out of school, instead of taking additional days for early dismissal?

The fact that we need to make each school accessible to residents via school choice because we do not have neighborhood schools leads to complex and expensive transportation needs. Ideally, when the choice was made to build the Parker-Damon building, it should have been constructed in North Acton, where there are no schools, and where the majority of the new residential construction is occurring. We understand that there is a preferential schedule where the Transportation Department has identified significant savings when Gates and Douglas are on the late schedule, on the order of ~\$30K. That savings should be permanent, easily accomplished by fixing the schedule permanently and stop spending the unnecessary transportation expense every other year. There are likely other efficiencies to be garnered by evaluating our transportation plan and perhaps these savings could be used to fund priorities such as Classroom Assistants.

If we are to we truly pride ourselves on school choice, and we wish to take advantage of the benefits of regionalization, we should consider streamlining the school schedule to either even out our school day to a fixed schedule every day (without the 1/2 day on Thursday), or at a minimum, move the half day to the beginning or end of the week to minimize disruption and take advantage of energy savings. If the time isn't being fully utilized as Professional Development time, there is no reason to impose such significant schedule and child care cost burdens on families.

It is widely apparent that the School Committee and those in the Acton Public School and Acton-Boxborough Regional School committees strive to be fair. We ask that your decisions be made with a focus on the needs of students and families as the first priority. We ask that you respectfully consider establishing a fixed schedule for each school, without changing from the "early" to the "late" schedule each year and thereby garnering

transportation and energy savings. We request that you eliminate or minimize the half-day Thursdays and early dismissal days and find a way to reduce the impact to the schedule for all.

Ideally, a consistent schedule would allow families to chose the schedule amongst a host of other factors that will help them make the best school choice for their families. We recognize that there are several issues tangled up together (including the classroom assistants) and we need to separate out each item for thoughtful consideration. Each one is important and it is easy to just leave things as the status quo, but hopefully the School Committee is open to change and acknowledges that what worked years ago may not be workable now or in the future.

We appreciate your thoughtful consideration and would be pleased to discuss any and all of the above at your convenience.

Sincerely,
Mike and Elizabeth Krol

*The Acton and Acton-Boxborough Regional Schools
and the
Acton Education Association*

*cordially invite you
to attend a reception to honor the following staff
who have given service to the
Acton and Acton-Boxborough Regional Schools
for twenty years*

★ ★ ★

Lynne French
Carol Huebner
David McClung*
David Rachlin
Kathleen Smith
Susan Sousa
Judith Painter*
Niki Holtzman*

**Will not be able to attend*

★ ★ ★

March 21, 2012

5:00 p.m.

\$15.00

Cash Bar

*Westford Grille
142 Littleton Road (Rt. 110) Westford*

*R.S.V.P. by March 14th
Judy Hause c/o Central Office
jhause@mail.ab.mec.edu*

(Please make checks payable to the Acton Education Association)

Acton Public School District FY'13 Budget

School Committee Meeting
March 1, 2012

APS FY'13 Budget (in thousands)

	APS
FY'12 Final	\$26,113
FY'13 Budget	\$26,562
\$ Change from Final FY'12	\$368k
% Change from Final FY'12	1.72%

APS Budget From FY'12 to FY'13

FY'13 APS Level Service (December, 2011)
3.3%

FY'13 APS Budget (March, 2012) 3.09%
(with Level Service & Investment Budget)

FY'13 APS Budget (March, 2012) 1.72%
(with Level Service & Investment Budget &
Federal EdJobs Grant)

APS Budget FY'13

APS Level Service Budget	1.61%
Federal EdJobs Grant	(1.37%)
Investment Budget Recommendations	<u>1.48%</u>
 FY'13 APS Budget	 1.72%

APS Budget FY'13

FY'10 to FY'11 Annual increase?	0.61%
FY'11 to FY'12 Annual increase?	0.78%
FY'12 to FY'13 Annual increase?	1.72%

FY'13 APS Budget

Review of Investment Budget Requests

Staff: \$108,000 In Classroom Assistants (\$21,600 per school)

0.4 FTE ELE teacher	(\$26k)
0.8 FTE Music Specialist	(\$45k)
1.0 FTE Physical Ed	(\$58k)
0.6 FTE Art Specialist	(\$43k)

Other: 0.5 FTE Budget Analyst (\$30k)

Health Insurance for Five Potential
New Positions **EST** (\$75k)

TOTAL: \$385k

FY'13 APS Budget (Continued)

January 5, 2012 (as proposed)	\$27,266,385
----------------------------------	--------------

February 2, 2012 (initial vote)	\$27,210,233
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March 1, 2012	\$26,562,103
---------------	--------------

(\$704,282 lower than 1-5-12)

FY'13 APS Budget (Continued)

Changes to FY'13 APS Budget since January:

Savings from Bus Lease Bid (\$31k)

Savings from Health Insurance Design Changes (\$244k)

Teacher New Resource Room at Douglas &
Health Insurance (\$70k)

EdJobs Grant Utilization (\$358k)

TOTAL (\$704,282)

APS FY'13 Budget

(From January 19, 2012 presentation)

Can we maintain our current level of service, keep lowering our reserves, address items from the Long Range Strategic Plan, and start to address our OPEB Liability at the same time?

APS FY'13 Budget

Can we maintain our current level of service ..

(Yes, we have)

keep lowering our use of total reserves ..

(from \$1.853m in FY'12 to \$1.7m in FY'13)

address items from the LRSP ..

(\$385,000 from Investment Budget)

and start to address our OPEB Liability?

(\$282,000 for Acton Municipal & Schools in FY'13)

FY'13 APS Budget Motion

\$26,562,103

To: Acton Public/Acton-Boxborough Regional School Committee Members

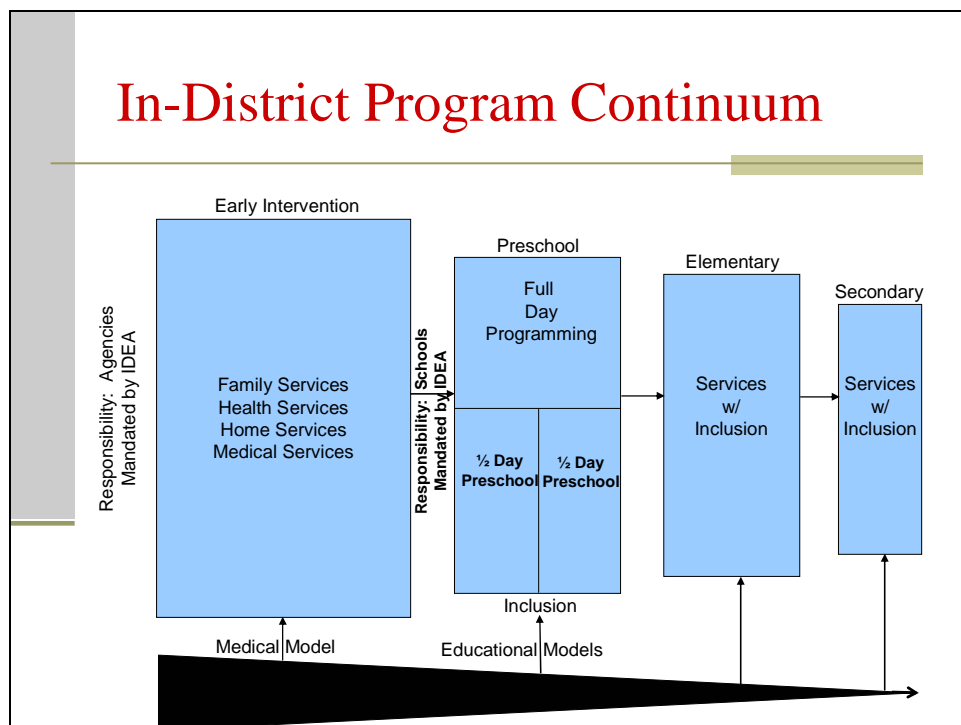
From: Liza Huber, Director of Pupil Services

Cc: Dr. Steve Mills

Date: February 28, 2012

Subject: Early Childhood Services

A few weeks ago, I gave a presentation on our Early Childhood Services by sharing the IDEA requirements, the process and procedures that school districts abide by, the responsibilities of the district in “child find” requirements, and the programs and services we develop to ensure the “best shot” educationally and socially for these at risk students. We creatively developed integrative programs so our toddlers can “model up” but coincidentally, as a collateral benefit, we have offset some of our tuition costs as we charge for those toddlers who are enrolled as regular education students. As I shared with you, we received an unexpected number of move-ins and referrals from the Department of Public Health, which necessitated adding an additional section. Early intervention programs do not necessarily pay off today, but they pay off tomorrow and all the tomorrows thereafter, evidenced by reduction in referral rate, frequency of service, type of service and longevity of service as described in my in-district program continuum slide.



What was striking though was the article that appeared in last Sunday's Boston Globe (2.26.12) which I attached as a pdf for ease of reading. Although an urban school, Boston's preschool special education numbers have surged over the last three years, which was not expected. Boston has opened two-dozen new classrooms since September, an unusual hike to the two or three added classrooms per year. A staggering realization is the chart on the last page of the article, which gives the number of students enrolled in selected programs over the last three years. Because of its wait lists, a federal lawsuit has been filed against Boston.

To look at ourselves for the moment, we are making efforts, responsive in nature to the understanding that numbers are increasing, mandated outreach has a broader net, medically fragile toddlers are being enrolled and the increase of children with autism is factual. We strive to do our best with the resources we have, make recommendations that are reasonable, and avoid potential due process situations, wherever possible. My main goal remains the same ~ develop programs that are meaningful to children, thereby giving them a set of skills so that they can compete, wherever possible, with their peers in a timely manner.

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The Boston Globe

Metro

Special needs preschoolers on rise in Boston

Schools strain to make room for preschoolers

By [James Vaznis](#) | GLOBE STAFF FEBRUARY 26, 2012



JOANNE RATHE/GLOBE STAFF

Teacher Jane Good helped Ari Anthony Almonte Vasquez with his motor control.

The number of preschoolers with disabilities in the Boston public schools has surged more than 50 percent over the last three years, an unanticipated increase that has

prompted school officials to scramble to add classrooms.

With the bulk of the increase occurring this year, school officials have opened nearly two dozen new preschool classrooms since September — far more than the two or three it usually adds during a school year to meet a federal mandate to teach children with disabilities as soon as they turn 3.

In a dramatic move earlier this month to make space for up to 15 new preschool classrooms, the School Committee approved the immediate reopening of a Dorchester elementary school it had closed just eight months ago as part of budget cuts.

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So far, the School Department has nearly 700 students with autism or other disabilities in its preschool programs and is expecting to enroll about 75 more by the end of the school year. By comparison, preschool classes wrapped up three years ago with 482 students with disabilities.

Related

Graphic: A sample of special education preschool enrollment

“The main challenge we have run into this year is space,” said John Verre, assistant superintendent for special education and student services. “We’ve been combing buildings for empty classrooms or rooms that could be converted into classrooms.”

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The increase comes at a steep price: Spending on preschool special education programs is expected to reach nearly \$10 million for the next school year, a 28 percent increase from the 2008-2009 school year. Overall, the city is anticipating spending almost \$198 million on special education across all grade levels next year.

‘I think the School Department has the desire to serve these children, but the district has fallen short.’

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Julia Landau advocate

There are myriad theories for the growth in preschoolers requiring special education.

Chief among them: Advances in medicine that have allowed infants born prematurely or with potentially life-threatening conditions to survive, often with a host of developmental issues.

Special education advocates have also been raising awareness among parents that 3- and 4-year-olds with disabilities are legally entitled to enroll in city schools before kindergarten.

Boston school officials, in turn, say they have been more aggressive this year in holding screenings in various neighborhoods to identify toddlers with disabilities so they can enroll in the system.

This comes more than two years after the state Department of Elementary and Secondary Education in a routine review found that Boston frequently violated state and federal laws by failing to immediately place children with disabilities in preschool. Last fall, as children still lingered on waiting lists, an education advocacy organization filed a federal lawsuit against the city.

“I think the School Department has the desire to serve these children, but the district has fallen short in ways where the children are paying the consequences,” said Julia Landau, a senior project director at Massachusetts Advocates for Children, the Boston-based nonprofit that filed the lawsuit. “I think that’s a tragedy.”

Despite this pressure, officials say that the primary motivation behind their more aggressive tactics has been the desire to get the children into preschool so they can gain a stronger academic footing before they enter kindergarten.

Because of its outreach in neighborhoods and other efforts, officials expected more 3- and 4-year-olds with disabilities to enter the system this year, but the actual enrollment has far outpaced the projections.

One aspect of the increase - the growth in children being diagnosed with autism - remains a mystery as medical experts, parents, and advocates research and debate a number of potential causes. Autism is a developmental disorder that impedes one’s ability to communicate and is often marked by awkward social interactions and

repetitive behavior.

Currently, the city has enrolled about 150 preschoolers with autism - up from 75 in October 2008 - representing one of the largest categories of preschoolers with special needs.

Preschool can be a boon for students with disabilities, providing them a head start on their education. Some students with less severe developmental delays, such as speech disorders, do so well they no longer require special education once they enter kindergarten.

Boston scatters its preschoolers with special needs across more than 100 classrooms. Most of these students are taught in separate classrooms, and class sizes can be small. No more than eight students are allowed in classrooms for autism, which are staffed with a teacher and two aides.

Tynan Elementary School in South Boston began the school year with two classes for preschoolers with autism, and then added a third classroom in December. Now principal Eileen Morales is trying to determine if she has space for a fourth classroom this fall.

Earlier this month in a preschool class, five students with autism took turns with an iPad, learning how to count and to develop fine motor skills with their fingers as they tapped images of balloons, crocodiles, and cupcakes or guided together the pieces of a puzzle.

“Good job,” teacher Jane Good said in an encouraging voice as 4-year-old Jair Garcia-Bientez successfully completed a puzzle.

With other children, Good gently straightened their index fingers and helped them drag the images.

Across the state, the number of students between the ages of 3 and 5 who require special education has increased only slightly from 14,754 during the 2008-09 school year to 14,915 this year. But within that population, one segment - students with

autism - has grown notably.

Like Boston, many school districts are struggling to evaluate and place students with disabilities in preschool programs in a timely fashion.

Only 80 percent of students eligible for special education services received them by their third birthday during the 2009-10 school year, down from 94 percent the previous year, according to a report this month by the state Department of Elementary and Secondary Education. The report partially attributed the slippage to staffing shortages.

But in Boston, the problem goes beyond placement. Some students, once they are enrolled, are not receiving all the services they should. Verre said there are about a dozen preschoolers with autism who are waiting for a behavior specialist because the contractors who provide that service need to hire and train additional staff.

A Dorchester mother, who requested anonymity, has been waiting nearly three months for a behavior specialist for her 4-year-old son, after a previous specialist abruptly stopped working with him.

“When it stopped, he regressed,” the mother said, wiping away progress he had made in listening, staying calm and speaking some words. “He used to be a good boy.”

Now, she said he repeatedly wakes up during the night, cries, screams, breaks things, kicks people, and tries running into the street. It’s the latest setback he has experienced in preschool, which began with a three-month delay in securing a seat more than a year ago, the mother said.

Verre said he expects to have the behavioral specialists in place in the next few weeks, and that the expansion of preschool classes this year should position the district well in handling next year’s enrollment needs.

Carolyn Kain, chairwoman of the Boston Special Education Parent Advisory Council, said the School Department is responding to the increasing demand as best as it can, and that the growth may also reflect greater acceptance among parents that the

diagnosis of a disability can be a vehicle to getting the help their children need.

“Hopefully if kids are getting intervention earlier, many will not have to continue the services later on,” Kain said.

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A sample of special education preschool enrollment

Over the last three years, Boston Public Schools has seen an increase of more than 50 percent in the number of preschoolers with autism and other developmental delays.

*The numbers for April and June 2012 are projections

Students in autism classrooms

SCHOOL YEAR	OCT.	DEC.	APRIL	JUNE	PERCENTAGE CHANGE FROM PREVIOUS YEAR
2009-2010	77	81	98	109	+11.2%
2010-2011	85	94	117	126	+15.6%
2011-2012	113	137	170*	186*	+47.6%

Students in integrated and substantially separate classrooms

SCHOOL YEAR	OCT.	DEC.	APRIL	JUNE	PERCENTAGE CHANGE FROM PREVIOUS YEAR
2009-2010	258	273	354	375	+11.3%
2010-2011	285	286	353	376	+0.3%
2011-2012	351	413	501*	537*	+42.8%

NOTE: Numbers are for district's largest special education preschool programs.
SOURCE: Boston Public Schools

Monica Ulmanu GLOBE STAFF

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