### CES BOARD OF DIRECTORS MEETING AGENDA (DRAFT)

**WEDNESDAY, SEPTEMBER 27, 2017 (6:30-9:00)**

**FRANKLIN REGIONAL TRANSIT AUTHORITY IN THE COMMUNITY ROOM ON THE FIRST FLOOR**

**12 Olive Street, Greenfield, MA 01301**

Please Note: There will be a new Board member orientation beginning at 5:30pm. Dinner is at 6:00 p.m.

<table>
<thead>
<tr>
<th>AGENDA ITEM</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Call to Order and Introductions – Board Chair Dan Hayes</td>
<td>6:30</td>
</tr>
<tr>
<td>Introduction of new Deputy Director</td>
<td></td>
</tr>
<tr>
<td>2. Public Session/New Business</td>
<td>6:45</td>
</tr>
<tr>
<td>4. Election of Officers (votes required)</td>
<td>6:55</td>
</tr>
<tr>
<td>- Election of Chair and Vice Chair</td>
<td></td>
</tr>
<tr>
<td>- Election of At-Large Members of Executive Committee</td>
<td></td>
</tr>
<tr>
<td>5. Appointment of Secretary (vote required)</td>
<td>7:05</td>
</tr>
<tr>
<td>Appointment of Treasurer (vote required)</td>
<td></td>
</tr>
<tr>
<td>6. Appointment of Finance Committee (vote required)</td>
<td>7:10</td>
</tr>
<tr>
<td>7. Establish Warrant Sub-Committee (3 members of Board) (vote required)</td>
<td>7:15</td>
</tr>
<tr>
<td>8. Hires and Separations for July and August, 2017 (information only) and Hires and Separations for September, 2017 (vote required)</td>
<td>7:20</td>
</tr>
<tr>
<td>9. Vote that the Executive Director of the Collaborative for Educational Services (William A. Diehl) is authorized, empowered and directed on behalf of the Collaborative to sign, seal, execute and deliver any and all contracts, agreements and other documents on behalf of the organization, as allowed by law (vote required)</td>
<td>7:30</td>
</tr>
<tr>
<td>- Vote that the Deputy Director and Director of Finance and Operations are each authorized, empowered and directed to act in place of the Executive Director to sign, seal, execute and deliver any and all contracts, agreements and other documents on behalf of the organization, as allowed by law, if and only if the Executive Director is unable to fulfill these duties in a timely manner sufficient to meet specific deadlines (vote required)</td>
<td></td>
</tr>
<tr>
<td>10. Executive Director Goals for 2017-2018 (vote required)</td>
<td>7:40</td>
</tr>
<tr>
<td>11. Motion to go into Executive Session (M.G.L. Chapter 30A, Section 21 (a)(6), “to consider the purchase, exchange, lease or value of real property if the chair declares that an open meeting may have a detrimental effect on the negotiating position of the public body.” (vote required)</td>
<td>7:55</td>
</tr>
<tr>
<td>Motion to go back into Open Session (vote required)</td>
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</tr>
<tr>
<td>Motions re: real estate (if there are any) (votes required)</td>
<td>8:15</td>
</tr>
<tr>
<td>12. Report on Business Plans for OT and CCATT Centers</td>
<td></td>
</tr>
<tr>
<td>13. Other business requiring a vote</td>
<td>8:35</td>
</tr>
<tr>
<td>a. Interest of the Gateway Regional School District in re-joining CES (vote required)</td>
<td></td>
</tr>
<tr>
<td>b. Interest of Sabis International Charter School in Springfield, and possibly in Holyoke and/or Lowell in receiving program review, technical assistance, coaching, and/or professional development from CES on a fee-for-service basis (non-members) (vote required)</td>
<td></td>
</tr>
<tr>
<td>14. Executive Director’s Report (In packet)</td>
<td>8:50</td>
</tr>
<tr>
<td>15. Adjournment (vote required)</td>
<td>9:00</td>
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</tbody>
</table>

*Everyone is a learner:*
BOARD OF DIRECTORS

MEETING MINUTES

June 28, 2017

MEMBERS of the Collaborative for Educational Services
Hampshire County

Amherst-Pelham Regional Schools
Easthampton Public Schools
Hatfield Public Schools
Southampton Public Schools
Smith Vocational & Agricultural School

Franklin County
Conway Public School
Frontier Regional School District
Leverett Public School
Pioneer Valley Regional
Sunderland Public School

* Amherst Public Schools
* Granby Public Schools
* Northampton Public Schools
* Ware Public Schools

Belchertown Public Schools
Hadley Public Schools
Peilham Public Schools
Westhampton Public Schools

* Chesterfield-Goshen Public Schools
* Hampshire Regional Schools
* South Hadley Public Schools
* Williamsburg Public Schools

Deerfield Public School
Gill-Montague Regional
Mohawk Trail Regional
RC Mahar Regional
Wendell Public School

Erving Elementary School
Greenfield Public Schools
New Salem School
Rowe Elementary School
Whately Public School

* Franklin County Technical School
* Hawlemont Regional
* Orange Public School
* Shutesbury Public School

Everyone is a learner
Collaborative for Educational Services  
Board of Directors Meeting Minutes (DRAFT)  
June 28, 2017  
CES – 97 Hawley Street  
Northampton, MA

Present from the Board: Ahart, Bartlett, Burke, Crawford, Dion, Englehardt, Hamdan, Hayes, Kwiecinski, Moore, O’Riordan, Schlerman, Simpson  
Present from CES: W. Diehl, A. Farrington, A. Burke, S. Smith, B. Siegel, K. Levesque, G. Morrissey, D. Olsson

Moment of Silence for Commissioner Mitchell Chester

The Board had a moment of silence for the recent passing of Commissioner of Education Mitchell Chester.

Introductions

At 6:35 pm the meeting could not be called to order due to lack of a quorum. The board introduced themselves to each other as there were several new board members present this evening.

Call to Order

At 6:40 pm, Board Chair Dan Hayes called the meeting to order as a quorum was now present.

Public Session

Dan Hayes reported that he had the opportunity to go to two of our CES graduations (HEC Academy and Mount Tom). He noted how amazing it was to see the students and the opportunities they have. He met the students at HEC Academy and noted the utmost respect for the teachers and staff at the Academy.

Dan also clarified that at the last Board meeting that Bill Diehl’s contract had been voted on. His contract was approved. There is no buy back on sick time at the Collaborative which is also true of Bill’s contract.

Sign-ons: Dan reported that a “Stand Together” document had been given to him and Bill Diehl. Also, Bill recently wrote a letter to Senator Elizabeth Warren from CES. Bill has often asked Dan how he feels about sign-on documents and also how he feels about composing something that should perhaps first come before the board. There have been times when we have signed onto a document: does the Board feel comfortable with that? The board does not have any objections to Bill having this authority. Dan proposed that Bill has the latitude to sign these and then would inform the Executive Committee if it was something he was unsure about. The Board agreed to this methodology.

Cathy noted she attended a conference on grandparents bringing up grandchildren. She was very impressed with the conference. She noted there were about 250 people present. She also noted they had a wonderful keynote speaker. Cathy shared that she attended the impact of trauma on children workshop. The presentation was put on by UMass Medical School child training specialists. She stated that this is an
area that schools need to be aware of and prepared for. Bill noted we are building capacity in this area at CES and would like to do more. The keynote, Jarrett Krosoczka, is from the Northampton area, and Cathy noted he was very well received.

Also, the new Deputy Director position is in the final stages of hire. Dan Hayes and Cathy Englehardt from our Board have been on the interview committee.

**Approve Open and Executive Session Minutes of the May 24, 2017 Board of Directors Meeting (vote required)**

Hussain Hamdan moved to approve the minutes of the Executive Session of the CES Board of Directors meeting of May 24, 2017. Cathy Englehardt seconded the motion. All were in favor, and the motion passed.

A motion was then made by Hussain Hamdan and seconded by Cathy Englehardt to approve the minutes of the Open Session of the CES Board of Directors meeting of May 24, 2017. All were in favor, and the motion passed.

**CES Fiscal Year 2017 Affirmative Budget Vote (vote required)**

A motion was made to approve the CES fiscal year 2017 affirmative budget by Hussain Hamdan and seconded by Cathy Englehardt. Barbara noted that we are not committing to a CBWE commission rate right now. No changes have been made from the May, 2017 budget presentation. All were in favor, and the motion passed.

**OTC and CCATT (possible vote required)**

Barbara Siegel reported that these two centers have been struggling to meet their expenses for several years. Of recent, there was a board discussion where the board decided to support the programs and get them back on their feet. A committee of the board who were designated to find out more about these programs then spoke to the staff of these programs, as well as other CES staff, and came up with the outline of future plans for the programs; CES staff will develop a more detailed business plan for each to be presented to the board in September. A report on progress will also be brought back to the board in January 2018 about these two programs.

OTC (Occupational Therapy Center) – This program will have a day-long retreat in August with other CES staff to continue detailed planning. One outcome is to develop a market research plan. A report will be prepared for the board in Sept. summarizing the research that has been done. For the January board meeting, the business plan will be assessed and re-adjusted. Staff time/operations will also be researched. New rates will also be established.

CCATT (Collaborative Center for Assistive Technology and Training) - How do we reinvent this center to take advantage of our expertise and meet the needs of our clients? A similar process will be used like the OTC center, but it is a very different area. Can the board get behind us moving forward with these two centers in a re-invented way?
Hussain Hamdan made a motion and Suzanne Crawford seconded it to endorse the plans that were presented for the CCATT and OTC Center. All were in favor and the motion passed.

**CBWE Update (possible vote required)**

Information has come to light per Barbara Siegel, that right now we have three students committed to be in this program for SY 2017-18. We do not know what will happen in January as one will graduate. We are unsure as to what will happen with this program - at the end of the semester there may have been other arrangements made for the other two students. It would be a cost of $24,000 to us should CBWE not continue in the spring. CBWE stands for community based work program, and it is for older students - thru age 22. What would happen to staff if the program closed? One teacher is planning to retire and one para is planning to retire. One employee would be affected in a very real way who is not planning not to retire. Sherry Smith will continue to work with Springfield on setting a tuition for the students that will meet CES’s costs. Sherry will also continue to try to recruit more students.

**Annual Survey – Kathy Levesque**

Kathy explained that our annual survey started in 2013. We usually get back answers to the survey from teachers, administrators, and early childhood partners from different counties. We then get a fix each year on emerging concerns of the educators (especially teachers) we serve in our districts. This year we found an increased number of people were aware that they were members of the Collaborative in Franklin and Hampshire counties, but a lower percentage knew what the benefits were. There was a high awareness of PD and consulting services. Special Education PD and consulting services rocketed to an 80% awareness level. This is hugely successful for a new service at CES. There was also a very high approval rating for the introduction of our SJE services. Business services had low awareness in this mix because not many people use them.

Regarding SJE services, 60% of people using this service are likely to recommend it and 60% of people using the SpEd PD service are likely to recommend it. Student services approval was 70%. Almost 600 people responded to this survey. 80% said they were more interested in services we offer. In 2016 and 2017 the respondents started to talk about behavior issues and mentally and emotionally challenged students. They feel like they don’t have the training to support these students appropriately. We have been training trainers around the state on this topic stated Bill. There is now also more inclusion of students with severe needs. Board member Melissa Burke asked that this Annual Survey report be shared with administrators at schools.

**Update on Outcome Study – After School – Gwynne Morrissey**

Gwynne Morrissey gave a PowerPoint present on the CES 21st CCLC Afterschool Programs in Easthampton from student, family and staff perspectives. The impact is highly beneficial on students who attend after school programs. Gwynne spent time talking to students, staff and parents about these after school programs in Easthampton.

After school programs at Pepin Center include art projects, reading, homework and science experiments. When parents were asked what were the best benefits about this afterschool program, they ranked them this way:

- Homework help
- Enrichment
- Mixed age interaction
- Child care in late afternoon

At Maple Elementary, the program integrates movement, art, homework and community service. Gwynne asked the staff what elements of this program were the best elements, and they responded:

- Skilled teachers
  - Commitment to inclusion
  - Collaborative problem solving

The Easthampton High program served 50 students this year.

- They plan to change offerings this year
- They offer math tutoring, rock band, fitness, team eats, juggling

What makes these programs successful?

- Compassionate adults, a variety of enriching social activities and family or teen oriented timeframe. CES has 11 afterschool programs and we received another program this week. The Board thanked Gwynne for the very informative presentation and asked if they could receive a copy of her presentation.

**Hires and Separations (vote required)**

Hussain Hamdan moved to approve the Hires and Separations. Cathy Englehardt seconded the motion. There were three retirements and one person resigned to have a baby. A new hire is a person returning to CES from the Early Childhood department to the business office to do the accounts receivable job. All were in favor, and the motion passed.

**Executive Director’s Report**

**Business Systems:** Bill reported that the business office has been hard at work bringing in and tailoring Infinite Visions software which will be launched on July 1st. The CRM management system, SalesForce, is largely being implemented. Kathy and Angela help to manage that. Applitrack is now up and running – which is a new applicant tracking system. Bill noted that we have a lot of challenges in front of us - needs are changing and we need to figure out how to best meet them.

**Restructuring of CES** – Bill stated that the re-organization of CES has been a year long process. There will be a cabinet reporting to the Executive Director. The Cabinet will be the new Deputy Director who will oversee all of our direct services; Barbara Siegel, Director of Finance and Operations; Kathy Levesque, Director of Business Development and External Relationships; Angela Burke, Director of Professional Services; Woody Clift (Director of the DYS Educational Services; Terry Senio, Director of the SEIS contract; and possibly a few more, TBD. Platforms are ending and there will be a transition to this new re-organization.

**Advocacy** - Bill has been advocating for CES and for our member (and rural) districts. He is meeting with legislators around educational issues. He has done some work with legislators around an act to promote diversity and inclusion in education.
The American Health Care Act - Bill wrote a letter concerning this topic to Senator Elizabeth Warren. Senator Warren’s staff asked if they could use our letter.

**PD and Development:** Bill reported that the Franklin/Hampshire Summer Academy is about to start. In addition, we are working with Easthampton with focus groups to come up with some recommendations around racial and ethnic issues they are having. Many districts have the same issues. We are working with the DA’s office to be more proactive around these issues.

We also received an award for some assistive technology work. We were also awarded the Teaching Students in Poverty grant. We received the MA licensure academy grant to do two courses for free. We also received an NEA Grant - a federal grant and put in a Barr Foundation grant with Turners Falls on very short notice.

**Building Feasibility Study** – We spoke with our 97 Hawley St. building developers around putting a third story on the building. The outcome is that it will cost over $1,000,000 to add a third floor. We have also been looking at the land next door - if it can ever be freed up for building. Another plan is that the architect stated our buildings might be worth enough money for us to sell and relocate. They will get back to us as to the worth of the building at 228 Pleasant Street and also 97 Hawley Street.

**July 3:** Bill noted that July 3rd is the day before the holiday. Other collaboratives are closing on July 3rd. Bill would like to close on July 3rd. The Board agreed to this closing, with Johanna Bartlett motioning for CES to close on July 3rd and Hussain Hamdan seconding the motion. All were in favor, and the motion passed.

**Topics of Concern to Board Members**

There were no topics of concern to board members. Dan Hayes thanked Sarah Molloy for filling in for Anne Farrington at the past two board meetings. He also noted that in the board packets was the schedule for board meetings for next year, beginning in September, 2017.

**Adjournment (vote required)**

Cathy Englehardt motioned to adjourn and Johanna Bartlett seconded the motion. All were in favor, and the board adjourned at 8:47 pm.

Respectfully submitted,

William Diehl
EXECUTIVE COMMITTEE

MEETING MINUTES

August 25, 2017
Executive Committee Meeting – DRAFT Minutes  
August 25, 2017

The meeting began at 8:35 a.m.

In attendance were:
- Executive Committee members: Dan Hayes, Cathy Englehardt, Hussain Hamdan, and Vira Douangmany Cage
- From CES were Barbara Siegel, Director of Finance, and William Diehl, Executive Director

1. Bill distributed the listing of Hires and Separations from the end of June through September 1, 2017.
   a. The Committee reviewed and asked for some additional information which Bill provided.
   b. Hussain Hamdan moved to approve the hires and separations. Cathy Englehardt seconded and all approved.

2. Intention to apply for a mortgage: Bill and Barbara discussed CES’s intention to apply for a mortgage, as required by the CES Articles of Agreement, in order to give 30 days notice to the entire Board about this intention and for a vote.
   a. Bill and Barbara provided an overview and history of the property in consideration, as well as documentation about our current properties (97 Hawley and 123 Pleasant). (These documents were provided later to the entire Board)
   b. Comparable buildings with selling prices were also distributed.
   c. Information was reviewed and discussed, as were questions about what CES can afford to pay / what kind of added mortgage can CES cover. Barbara reviewed the numbers as well as the costs for acquiring loans.
   d. There was a discussion about creating one campus for the Academy + offices.
   e. The committee discussed another option of relocating all of CES
   f. Recommendations included:
      i. Ask Goggins Realtors to investigate and supply information about other locations on the market
      ii. Investigate the experience of other collaboratives in doing similar projects
      iii. Look at possible building options on the property in question. Consider building so it be used for rentals to businesses if needed. Look at current income demand
      iv. Ask Berkshire Design to provide a rough estimate of construction costs
      v. Identify / use a third party with expertise to help CES with the process
      vi. Take action that may be necessary to protect our right of first refusal with minimal fiscal commitment by the Board before the 9/27 meeting.
g. A motion was crafted to “Give authority to CES staff to investigate options concerning the purchase and sale of real estate and options for financing in preparation for discussion and votes by the Board of Directors at the September 27, 2017 meeting.” Hussain made the motion, Cathy seconded and all approved.

3. Hussain moved to adjourn the meeting and Cathy seconded.

The meeting adjourned at 9:45

Respectfully submitted,

[Signature]

William Diehl
Acting Secretary
HIRES AND SEPARATIONS

JULY AND AUGUST 2017

MEMBERS of the Collaborative for Educational Services
Hampshire County

Amherst-Pelham Regional Schools * Amherst Public Schools * Belchertown Public Schools * Chesterfield-Goshen Public Schools
Easthampton Public Schools * Granby Public Schools * Hadley Public Schools * Hampshire Regional Schools
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Pioneer Valley Regional * RC Mahar Regional * Rowe Elementary School * Shutesbury Public School
Sunderland Public School * Wendell Public School * Whately Public School * Shutesbury Public School

97 Hawley Street
Northampton, MA 01060
413.586.4900 | 413.586.0180 fax
## HIRES AND SEPARATIONS JUNE 20, 2017 - AUGUST 15, 2017

### HIRES

<table>
<thead>
<tr>
<th>Last</th>
<th>First</th>
<th>DATE HIRED</th>
<th>PROGRAM</th>
<th>POSITION</th>
<th>Part-time or Full-time*</th>
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<tbody>
<tr>
<td>BROWER</td>
<td>BRYAN</td>
<td>7/24/2017</td>
<td>SEIS</td>
<td>TECHNOLOGY SUPPORT SPECIALIST</td>
<td>FULL-TIME</td>
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<tr>
<td>COLON</td>
<td>CRYSTAL</td>
<td>7/18/2017</td>
<td>ADMINISTRATION</td>
<td>DEVELOPMENT SPECIALIST</td>
<td>FULL-TIME</td>
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<td>CHURCH</td>
<td>ALLISON</td>
<td>8/14/2017</td>
<td>PROFESSIONAL DEVELOPMENT</td>
<td>LICENSURE - TECHNOLOGY</td>
<td>FULL-TIME</td>
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<tr>
<td>SENIO</td>
<td>TERRY</td>
<td>9/1/2017</td>
<td>ADMINISTRATION</td>
<td>DEPUTY DIRECTOR</td>
<td>FULL-TIME</td>
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<tr>
<td>CAHOON-MCEWEN</td>
<td>HEIDI</td>
<td>9/1/2017</td>
<td>SEIS</td>
<td>DIRECTOR OF THE SEIS CONTRACT</td>
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### SEPARATIONS

<table>
<thead>
<tr>
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<th>DATE OF SEPARATION</th>
<th>PROGRAM</th>
<th>POSITION</th>
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<tbody>
<tr>
<td>CRAVEN</td>
<td>LINDA</td>
<td>6/30/2017</td>
<td>SEIS</td>
<td>TEACHER</td>
<td>FULL-TIME</td>
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<tr>
<td>FAUST</td>
<td>DEBORAH-ANN</td>
<td>6/30/2017</td>
<td>SEIS</td>
<td>TEACHER</td>
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<tr>
<td>ALDERMAN</td>
<td>NAT</td>
<td>6/28/2017</td>
<td>DYS</td>
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<tr>
<td>BERNIER</td>
<td>ANDREA</td>
<td>6/28/2017</td>
<td>DYS</td>
<td>TEACHER</td>
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<tr>
<td>FARRELL</td>
<td>MARK</td>
<td>6/28/2017</td>
<td>DYS</td>
<td>TEACHER</td>
<td>FULL-TIME</td>
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<tr>
<td>MUHAMMAD</td>
<td>RAUSHANAH</td>
<td>6/27/2017</td>
<td>DYS</td>
<td>TEACHER</td>
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<tr>
<td>TIMMINS</td>
<td>PATRICIA</td>
<td>6/27/2017</td>
<td>SEIS</td>
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<tr>
<td>WELCH</td>
<td>MICHAEL</td>
<td>6/27/2017</td>
<td>DYS</td>
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<tr>
<td>FOUNTAINE</td>
<td>LU ANN</td>
<td>6/26/2017</td>
<td>SEIS</td>
<td>TEACHER COORDINATOR</td>
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</tr>
<tr>
<td>ULWICK</td>
<td>LISA</td>
<td>6/26/2017</td>
<td>SEIS</td>
<td>TEACHER</td>
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</tr>
</tbody>
</table>

* Full-time: 35 + hrs/wk
** Part-time 20 - 34 hrs/wk
MEMBERS of the Collaborative for Educational Services
Hampshire County
- Amherst-Pelham Regional Schools
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  Hawlemont Regional
- Orange Public School
  Shutesbury Public School

Everyone is a learner
### HIRES AND SEPARATIONS  AUGUST 16, 2017 - SEPTEMBER 22, 2017

#### HIRES

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<th>PROGRAM</th>
<th>POSITION</th>
<th>Part-time or Full-time*</th>
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<tr>
<td>ROMAN</td>
<td>ADID</td>
<td>08/27/2017</td>
<td>HEC ACADEMY</td>
<td>SCHOOL PSYCHOTHERAPIST</td>
<td>FULL-TIME</td>
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<th>Part-time or Full-time*</th>
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<tr>
<td>ST. HILAIRE</td>
<td>AIMEE</td>
<td>08/31/2017</td>
<td>HEC ACADEMY</td>
<td>SPEECH PATHOLOGIST</td>
<td>FULL-TIME</td>
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<tr>
<td>FARRINGTON</td>
<td>ANNE</td>
<td>09/22/2017</td>
<td>ADMINISTRATION</td>
<td>EXECUTIVE ASSISTANT</td>
<td>FULL-TIME</td>
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## HIRES

<table>
<thead>
<tr>
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<th>PROGRAM</th>
<th>POSITION</th>
<th>Part-time or Full-time*</th>
</tr>
</thead>
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<td>Callaghan, David W</td>
<td>8/30/2017</td>
<td>DYS/SEIS</td>
<td>TEACHER</td>
<td>FULL-TIME</td>
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<td>Conrado, Theodulo</td>
<td>8/31/2017</td>
<td>DYS/SEIS</td>
<td>TEACHER</td>
<td>FULL-TIME</td>
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<td>DYS/SEIS</td>
<td>TEACHER</td>
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<td>Donovan, Roman</td>
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<td>TEACHER</td>
<td>FULL-TIME</td>
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<tr>
<td>Else, Mary Jane</td>
<td>8/31/2017</td>
<td>DYS/SEIS</td>
<td>TEACHER</td>
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<tr>
<td>Farias, Jeffrey J</td>
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<td>Johnson, Steven Morton</td>
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## SEPARATIONS

<table>
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<tr>
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<th>PROGRAM</th>
<th>POSITION</th>
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<td>Mulligan, James F</td>
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<td>SEIS</td>
<td>TEACHER</td>
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EXECUTIVE DIRECTOR

GOALS

2017 - 2018
EXECUTIVE DIRECTOR’S GOALS
FOR EDUCATOR EVALUATION -- 2017-2018
PRESENTED TO THE BOARD OF DIRECTORS, September, 2017

# 1 - Professional Practice (Superintendent Evaluation Goal 1)

**During 2017-2018,** I will increase my knowledge and skills in my professional practice and successful management of the Collaborative through:

1. Furthering of job-related knowledge and skill development through participation in targeted professional development including:
   - Legal Seminars on educational issues;
   - ESE and EEC sponsored conferences;
   - MASS and MASC convenings;
   - Massachusetts Organization of Educational Collaboratives and the national Association of Education Service Agencies conferences and workshops;
   - Consultancy Groups with other superintendents facilitated as follow-ups to New Superintendent Induction Program (NSIP); and
   - Internal CES trainings on new technology tools and applications.

2. Participation in targeted training in at least one professional development workshop or course specifically aimed at improving one of the “Areas for Development” as identified last year as an area of growth (probably “Proactive with Staff Performance”)

3. Active participation in local, state and national organizations, both to gain professional knowledge and to further the work of CES.

#2 - Instructional Leadership / Student Learning #1 (Superintendent Evaluation Goal 2)

**During 2017-2018,** I will provide leadership that will impact instruction and student learning in our direct-service programs through:

1. Expanding the use of student progress and achievement data to inform instruction and monitor individual progress within our direct service programs (HEC Academy, Mt. Tom, Afterschool Programs, DYS, and SEIS).

2. Ensuring that educator evaluation is being completed, analyzed, and used for improvement for Special Education, DYS, SEIS, and other fulltime educators by supporting and holding accountable my administrators of direct service programs.

3. Ensuring SMART goal setting, aligned with the MA Educator Evaluation System, by the administrators of the direct service programs and evaluation of goal attainment for the purposes of improvement.
#3 - Instructional Leadership / Student Learning #2 (Superintendent Evaluation Goal 2)

During 2017-2018, I will support instructional leadership and student learning in our member districts by:

1. Expanding the professional development, consulting, and other assistance to our member districts in the areas of special education, inclusive practices, personalized learning, use of technology, and working with vulnerable youth.

2. Initiating and supporting, as part of the re-organization of CES, targeted research and evaluation for the agency and for direct service programs in our member districts to:
   - Collect and/or synthesize implementation and effectiveness information about identified programs for continuous improvement and demonstration of effectiveness.
   - Train CES leadership and department representatives in backward planning—including logic models, evaluation questions, and data collection targeted at improving planning, implementation, and effectiveness of services.

#4 - District Improvement #1 – Meet Member District Needs (Strategic Goal #1)/ Promote CES programs and services

During 2017-2018, I will institute processes to ensure better communication with member districts and increased responsiveness to district needs. This will include:

1. Continued focus on collecting needs-assessment data through surveys and interviews.

2. By delegating responsibilities to a Deputy Director and Cabinet, increase my time and emphasis on playing a liaison role to member districts in order to ensure greater coordination of services within CES and greater knowledge of and responsiveness to school district needs;

3. Continuing regular meetings with superintendents as well as job-alike meetings of Special Ed Directors, Curriculum Directors; Business Managers, and Technology Directors; in addition, the development of a robust process to collect and share across CES information about district needs gleaned at these meetings.

4. Continuing focus on clear, consistent communication about CES services and how they can assist districts in meeting current challenges and preparing for emerging trends.

5. Continuing to take a leadership role, to the extent permitted by applicable law, in identifying and advocating for issues and opportunities pertinent to our member districts.

# 5 - District Improvement #2 - Management and Operations / Improve the operations of the agency:

During 2017-2018 I will lead CES in implementing key enhancements to make CES more efficient, effective, inclusive and collaborative. This includes:

1. Implementation of the re-organization of CES from 15 departments, which are relatively siloed, to a structure that allows for greater collaboration and synergy of efforts, and minimizes duplication of functions. Goals include making CES more efficient, effective, responsive, collaborative, inclusive, innovative and with a diverse and empowered staff. This
includes re-filling the Deputy Director position to assume management and more support for our direct and professional services; the creation of a Cabinet; the re-organization of administrative assistant and events management functions to better serve the organization, and others.

2. Complete implementation of the enhancements, approved by the Board, of a) a customer-relations management (CRM) system to collect and share key data across the agency to increase efficiencies and better meet funder requirements; b) Infinite Visions (a shared enterprise system) to increase accuracy, efficiency, cost-effectiveness, and timeliness of human resources, fiscal, and business office functions; c) Applicant tracking to improve recruiting and hiring efficiencies; and d) the first stage of an electronic time and attendance system.

3. Continued implementation of a strategic plan to infuse more social justice and equity principles and practices in the agency.

4. Ensure implementation of strategic business plans for the OTC and CCATT centers, and work with leadership and the Board on developing similar plans for at least one other area of CES.
August 28, 2017

Dear CES Board Members:

I am writing in order to provide a 30-day notice that CES intends to apply for a real estate mortgage and will be presenting options and information and requesting Board approvals, at the Board meeting of September 27, 2017. The 30-day notice is required by the CES Articles of Agreement. The pertinent section of the Articles of Agreement is at the end of this notice.

Background: CES has been renting parking space on the lot south of the 97 Hawley St. administration building for a number of years. CES has also rented 5,277 sq.ft. of office and meeting space at 123 Hawley. Even with the 123 rentals, CES is outgrowing its space needs. In addition, CES has long considered the possibility of having our programs and offices on one campus – hence bringing the offices and meeting rooms together with HEC Academy at one location. For a number of years, one hope had been that the lot south of CES would come up for sale and we could build HEC Academy and office space there, hence creating one campus. (I should also note that two other collaboratives have, in the past year, done a similar consolidation of programs and offices under one roof.) In addition, we have also explored other options, such as moving all of CES to a new location.

Opportunity: In early August, we were informed by Goggins Realtors that the property south of 97 Hawley (which we now rent for parking) was going to be sold. The realtor, knowing of our interest, offered us right of first refusal, with an asking price of $900,000. In considering our options, we requested that a different agent provide us with estimates of the real estate of HEC Academy, on Pleasant Street, and our building at 97 Hawley. The figures are as follows:

- **97 Hawley St**
  - Market Value - $1,863,000
  - Potential List Price - $2,000,000

- **228 Pleasant St (HEC Academy)**
  - Market Value - $1,600,000
  - Potential List Price - $1,900,000

As the realtor noted in his email to us: “the numbers are based on both the comparable sales and income approach methods. Each property did have a usable sold comparable within the past year. The lease price of $16/SF inclusive I used is based on our own recent activity of office space leases.” Information about 97 Hawley, 228 Pleasant, and the lot south of us, as well as two real estate comparisons, were provided by the realtor and are attached in a separate file. The first three pages of the same attachment provide details on valuation, current mortgages, and estimated costs for a) land acquisition alone; and b) borrowing for land and construction.
Board Action: Given a tight timeframe to make our intentions to purchase (or not) known, I convened the Executive Committee of the Board on August 25, 2017. The Executive Committee discussed the intent to apply for a mortgage, reviewed the documents we had on hand, and discussed the options in detail. The Executive Committee then unanimously approved this motion: “The Executive Committee gives authority to CES administration to investigate options concerning the purchase and sale of real estate, as well as mortgage options, in preparation for the Board of Directors meeting on September 27, 2017.”

The next steps the Board needs to follow are outlined in the following pertinent section in our Articles of Agreement. (The Articles of Agreement was signed by all member school districts and approved by the CES Board on March 12, 2014.)

From the Articles of Agreement:

A. Borrowing, Loans and Mortgages. The Board may borrow money, enter into long-term or short-term loan agreements or mortgages and apply for state, federal or corporate grants or contracts to obtain funds necessary to carry out the purpose for which the Collaborative is established, provided, however, that the Board has determined that any borrowing, loan or mortgage is consistent with the written terms of the Collaborative and subject to the following procedures:

1. Borrowing, Loans, and Mortgages:
   a. all borrowing, loans, and mortgages shall be discussed at a public meeting of the Board;
   b. the Board shall discuss options related to borrowing, loans, and mortgages in order to determine that the terms related to any borrowing, loans and mortgages are the most favorable available at the time of the application;
   c. the Board shall determine, at a public meeting, through a majority vote, that the terms related to borrowing, loans, and mortgages are cost-effective and are the most favorable available at the time of application; and
   d. the Board shall determine, at a public meeting, through a majority vote, that the borrowing, loans, and mortgages are necessary to carry out the purposes for which the Collaborative is established.

2. Borrowing, loans or mortgages for the acquisition or improvement of real property:
   a. the Board shall discuss its intent to apply for a real estate mortgage at a public meeting of the Board prior to the meeting of the Board at which the final vote is taken;
   b. the Board shall provide notice to each member within (30) calendar days of applying for real estate mortgages; and
   c. the Board shall approve such action by a majority vote.

We will send Board members additional information prior to the meeting on September 27.

Thanks for your attention to this opportunity.

Sincerely,

[Signature]

William Diehl, Ed.D., Executive Director
Collaborative for Educational Services
WDiehl@collaborative.org  *  413-588-5901 (direct line)
Valuation

<table>
<thead>
<tr>
<th></th>
<th>228 Pleasant St</th>
<th>97 Hawley St</th>
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<tbody>
<tr>
<td>Square Footage of the Building</td>
<td>10,718</td>
<td>12,480</td>
</tr>
<tr>
<td>Rental Rate per Sq Ft</td>
<td>$16.00</td>
<td>$16.00</td>
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<tr>
<td>Rental Value of Property</td>
<td>$171,488.00</td>
<td>$199,680.00</td>
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<tr>
<td>less 30% for Maintenance</td>
<td>($51,446.40)</td>
<td>($59,904.00)</td>
</tr>
<tr>
<td>Net Operating Income</td>
<td>$120,041.60</td>
<td>$139,776.00</td>
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*Cap Rate from Commercial Appraisers is 7.5

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<tr>
<th></th>
<th>228 Pleasant St</th>
<th>97 Hawley St</th>
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<tbody>
<tr>
<td>Recommended List Price</td>
<td>$1,900,000.00</td>
<td>$2,000,000.00</td>
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Parking is a premium on Pleasant St

Building is in excellent condition

*The capitalization (cap) rate is the ratio of Net Operating Income to property asset value.
Current Mortgage

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<th>Monthly</th>
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<tr>
<td>98 Hawley &amp; 228 Pleasant</td>
<td>12,830.00</td>
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Mortgage Balance

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<tr>
<td></td>
<td>1,725,000.00</td>
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Current Rent Expenses

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<tr>
<th>Monthly</th>
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<tr>
<td>123 Hawley Rent</td>
<td>4,010.00</td>
<td>48,120.00</td>
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<td>Ed's Parking Rent</td>
<td>400.00</td>
<td>4,800.00</td>
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<td>4,410.00</td>
<td>52,920.00</td>
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<table>
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<tr>
<td>123 Hawley Rent by DYS</td>
<td>875.00</td>
<td>10,500.00</td>
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FY12 20 Yr Bond

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<tr>
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<th>Value in 2012</th>
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<td>700,000.00</td>
<td>1,600,000.00</td>
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<tr>
<td>97 Hawley Street</td>
<td>1,050,000.00</td>
<td>1,863,000.00</td>
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<tr>
<td></td>
<td>1,750,000.00</td>
<td>3,463,000.00</td>
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<td>1,821,326.00</td>
<td>FSB Loan Payout</td>
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<td>245,049.00</td>
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<td>Bond Total</td>
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Estimated Cost of Land Acquisition

$ 900,000.00
Interest Only

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<td>4.25%</td>
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<td>4.50%</td>
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<td>4.75%</td>
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<td>5.00%</td>
<td>$ 3,750.00</td>
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<tr>
<td>5.25%</td>
<td>$ 3,937.50</td>
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Estimated Borrowing for Land & Construction

Current Mortgage $1,725,000.00
Property Purchase $900,000.00
New Construction $2,100,000.00
Fixtures & Furnishings $250,000.00
Less Sale of 228 Pleasant St $(1,725,000.00)

Total $3,250,000.00

<table>
<thead>
<tr>
<th>20 Yrs</th>
<th>Monthly</th>
<th>Annually</th>
<th>$ More than Current</th>
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<td>$ 20,125.00</td>
<td>$ 241,500.00</td>
<td>$ 34,620.00</td>
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<tr>
<td>4.50%</td>
<td>$ 20,561.00</td>
<td>$ 246,732.00</td>
<td>$ 39,852.00</td>
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<td>4.75%</td>
<td>$ 21,002.00</td>
<td>$ 252,024.00</td>
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<tr>
<td>5.00%</td>
<td>$ 21,449.00</td>
<td>$ 257,388.00</td>
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<tr>
<td>5.25%</td>
<td>$ 21,900.00</td>
<td>$ 262,800.00</td>
<td>$ 55,920.00</td>
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</tbody>
</table>

Current Mortgage $153,960.00
Current Rents $52,920.00

Total $206,880.00
**OTHER POSSIBLE LOCATIONS**

**MEMBERS of the Collaborative for Educational Services**

**Hampshire County**
- Amherst-Pelham Regional Schools
- Easthampton Public Schools
- Hatfield Public Schools
- Southampton Public Schools
- Smith Vocational & Agricultural School

**Franklin County**
- Conway Public School
- Frontier Regional School District
- Leverett Public School
- Pioneer Valley Regional
- Sunderland Public School

| Amherst Public Schools | Granby Public Schools | Northampton Public Schools | Ware Public Schools | Belchertown Public Schools | Hadley Public Schools | Pelham Public Schools | Westhampton Public Schools | Chesterfield-Goshen Public Schools | Hampshire Regional Schools | South Hadley Public Schools | Williamsburg Public Schools | Deerfield Public School | Gill-Montague Regional | Mohawk Trail Regional | RC Mahar Regional | Wendell Public School | Erving Elementary School | Greenfield Public Schools | New Salem School | Rowe Elementary School | Whately Public School | Franklin County Technical School | Hawlemont Regional | Orange Public School | Shutesbury Public School |

*Everyone is a learner*
Northampton, MA: Commercial Property Record Card

Search For Properties
Parcel ID Name
32C-220-001

Street Name
HAWLEY ST

Living Units
0

Location
111 HAWLEY ST

Zoning
325 - n/a

State Class

Acres
0.345

Owner Information
Glowatsky Edwin C & Carl E

Deed Information
Book/Page: 1317/391

Deed DATE: n/a

Building Information
Building No: 1
Year Built: 1960
No of Units: 0
Structure Type: Auto Service
Grade: D
Identical Units: 1

Valuation
Land: $192,510
Building: $35,030
Total: $227,540
Net Assessment: $0

Sales History
Book/Page

Out Building Information
Structure Code

Exterior/Interior Information
Levels Size USE Type Ext. Walls Const. Type Partitions HEATING A/C Plumbing Condition Func. Utility Unadj. RCNL
01-01 1x1100 Multi-Use Sales Conc. Block Wood Joist Normal Unit Heat None Normal Fair Fair 10300
01-01 1x1100 Multi-Use Storage Conc. Block Wood Joist Normal Unit Heat None Normal Fair Fair 8570

Building Sketch

This is the lot next to 97 Hawley

Property Picture
Notice

The information delivered through this on-line database is provided in the spirit of open ACCESS to government information and is intended as an enhanced service and convenience for citizens of Northampton, MA.

The providers of this database: CLT, Big Room Studios, and Northampton, MA assume no liability for any error or omission in the information provided here.

Currently All Values Are Finalized For Fiscal Yr 2017.

Comments regarding this service should be directed to: jsarafin@northamptonassessor.us
Northampton, MA: Commercial Property Record Card

Search For Properties

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<th>Zoning</th>
<th>State Class</th>
<th>Acres</th>
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<tr>
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<td>97 HAWLEY ST</td>
<td>943 - n/a</td>
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Living Units: 0

Owner Information
Hampshire Educational Collaborative Inc

Deed Information
Book/Page: 5975/173
Deed Date: 2000/01/28

Building Information
Building No: 1
Year Built: 1930
No of Units: 1
Structure Type: Office Building - Low-Rise
Grade: B
Identical Units: 1

Valuation
Land: $398,330
Building: $1,232,190
Total: $1,630,520
Net Assessment: $0

Sales History
Book/Page | Date       | Price    | Type          | Validity |
-----------|------------|----------|---------------|----------|
N/a        | 2000/01/28 | $1,273,500 | Land + Bldg   | D        |
N/a        | 1999/05/19 | $125,000  | Land + Bldg   | 0        |

Out Building Information
Structure Code: Asphalt Parking

Exterior/Interior Information

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<th>Const. Type</th>
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<th>A/C</th>
<th>Plumbing Condition</th>
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<td>Brick</td>
<td>Wood Joist</td>
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<td>None</td>
<td>None</td>
<td>Fair</td>
<td>Fair</td>
<td>51050</td>
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<td>01-01</td>
<td>1x6240 Office Building</td>
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<td>Wood Joist</td>
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<td>Normal</td>
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Building Sketch

97 Hawley
Notice

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Currently All Values Are Finalized For Fiscal Yr 2017.

Comments regarding this service should be directed to: isarafin@northamptonassessor.us

\[ \text{\$14/sf} - \text{\$99,680} \]

NOI (60% cap) 139,774

\[ \text{op 7.5} - \text{\$1,803,280} \]

\[ \text{Lusten} \text{\$2,517} \]

97 Hyde, p. 2
<table>
<thead>
<tr>
<th>Location &amp; Ownership Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Address:</strong> 97 Hawley St, Northampton, MA 01060-3377</td>
</tr>
<tr>
<td><strong>Map Ref.:</strong> M:032C B:0221 L:0001</td>
</tr>
<tr>
<td><strong>Zoning:</strong> SI</td>
</tr>
<tr>
<td><strong>Owner 1:</strong> Hampshire Educ Collaborv</td>
</tr>
<tr>
<td><strong>Owner Address:</strong> 97 Hawley St, Northampton, MA 01060-3377</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Information</th>
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<tr>
<td><strong>Use:</strong></td>
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<tr>
<td><strong>Levels:</strong> 0</td>
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<tr>
<td><strong>Year Built:</strong> 1930</td>
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<tr>
<td><strong>Total Rooms:</strong> 0</td>
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<tr>
<td><strong>Bedrooms:</strong> 0</td>
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<tr>
<td><strong>Full Baths:</strong> 0</td>
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<tr>
<td><strong>Half Baths:</strong> 0</td>
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<tr>
<td><strong>Roof Type:</strong></td>
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<tr>
<td><strong>Heat Type:</strong> Forced Air</td>
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<tr>
<td><strong>Fuel Type:</strong></td>
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<tr>
<td><strong>Exterior:</strong> Brick</td>
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<tr>
<td><strong>Foundation:</strong></td>
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<tr>
<td><strong>Air Conditioned:</strong> No</td>
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<tr>
<td><strong>Style:</strong></td>
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<td><strong>Lot Size:</strong> 1.14 Acres (49658 sqft.)</td>
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<td><strong>Total Area:</strong> 0 sqft.</td>
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<tr>
<td><strong>Living Area:</strong> 0 sqft.</td>
</tr>
<tr>
<td><strong>First Floor Area:</strong> 0 sqft.</td>
</tr>
<tr>
<td><strong>Addl Floor Area:</strong> 0 sqft.</td>
</tr>
<tr>
<td><strong>Attic Area:</strong> 0 sqft.</td>
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<tr>
<td><strong>Finished Basement:</strong> 0 sqft.</td>
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<tr>
<td><strong>Basement:</strong> 0 sqft.</td>
</tr>
<tr>
<td><strong>Attached Garage:</strong> 0</td>
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<tr>
<td><strong>Other Garage:</strong> 0</td>
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<tr>
<td><strong>Fireplaces:</strong> 0</td>
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<tr>
<td><strong>Condition:</strong> Fair</td>
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<table>
<thead>
<tr>
<th>Assessment Information</th>
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<tbody>
<tr>
<td><strong>Last Sale Date:</strong> 1/28/2000</td>
</tr>
<tr>
<td><strong>Last Sale Book:</strong> 18</td>
</tr>
<tr>
<td><strong>Map Ref.:</strong> M:032C B:0221 L:0001</td>
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<tr>
<td><strong>Land Value:</strong> $398,330</td>
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<td><strong>Building Value:</strong> $1,232,190</td>
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<td><strong>Misc Improvements:</strong> $0</td>
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<tr>
<td><strong>Total Value:</strong> $1,630,520</td>
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<td><strong>Last Sale Price:</strong> $1,273,600</td>
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<td><strong>Tax Rate (Res):</strong> 16.69</td>
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<tr>
<td><strong>Fiscal Year:</strong> 2017</td>
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<tr>
<td><strong>Estimated Tax:</strong> $27,213.38</td>
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<table>
<thead>
<tr>
<th>Sales History</th>
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<tbody>
<tr>
<td><strong>Recent Sale #1</strong></td>
</tr>
<tr>
<td><strong>Sale Price:</strong> $1,273,600</td>
</tr>
<tr>
<td><strong>Sale Date:</strong> 1/28/2000</td>
</tr>
<tr>
<td><strong>Buyer Name:</strong> Hampshire Educ Coll</td>
</tr>
<tr>
<td><strong>Seller Name:</strong> Alan Verson</td>
</tr>
<tr>
<td><strong>Lender Name:</strong> Florence Svgs Bk</td>
</tr>
<tr>
<td><strong>Mortgage Amount:</strong> $1,250,000</td>
</tr>
<tr>
<td><strong>Sale Book:</strong> 18</td>
</tr>
<tr>
<td><strong>Sale Page:</strong> 41</td>
</tr>
</tbody>
</table>

| **Recent Sale #2** |
| **Sale Price:** $125,000 |
| **Sale Date:** 5/19/1999 |
| **Buyer Name:** Alan Verson |
| **Seller Name:** Rugg Lumber Co Inc |
| **Lender Name:** Seller |
| **Mortgage Amount:** $35,000 |
| **Sale Book:** 17 |
| **Sale Page:** 235 |

| **Recent Sale #3** |
| **Sale Price:** $90,000 |
| **Sale Date:** 1/5/1994 |
| **Buyer Name:** Alan Verson |
| **Seller Name:** Heritage Nt |
| **Lender Name:** |
| **Mortgage Amount:** $0 |
| **Sale Book:** 4396 |
| **Sale Page:** 283 |
## Mortgage History

### Recent Mortgage #1
- **Buyer Name:** Collaborative For Education
- **Mortgage Amount:** $5,125,000
- **Mortgage Book:** 18
- **Lender Name:** Peoplesbank (Holyoke)
- **Mortgage Date:** 5/23/2012
- **Mortgage Page:** 41

### Recent Mortgage #2
- **Buyer Name:** Hampshire Educ Collab
- **Mortgage Amount:** $650,000
- **Mortgage Book:** 3878
- **Lender Name:** Florence Svs Bk
- **Mortgage Date:** 2/3/2000
- **Mortgage Page:** 323

### Recent Mortgage #3
- **Buyer Name:** Hampshire Educ Collab
- **Mortgage Amount:** $650,000
- **Mortgage Book:** 18
- **Lender Name:** Florence Svs Bk
- **Mortgage Date:** 2/3/2000
- **Mortgage Page:** 42

### Recent Mortgage #4
- **Buyer Name:** Alan Verson
- **Mortgage Amount:** $1,000,000
- **Mortgage Book:** 0
- **Lender Name:** Florence Svs Bk
- **Mortgage Date:** 7/7/1999
- **Mortgage Page:** 0

### Recent Mortgage #5
- **Buyer Name:** Alan Verson
- **Mortgage Amount:** $20,000
- **Mortgage Book:** 4458
- **Lender Name:** Greenfield Svs
- **Mortgage Date:** 4/13/1994
- **Mortgage Page:** 139

---

 Bernie's parking. No blow dryers.
 Sprinkler systems.
 Elevator.
Northampton, MA: Commercial Property Record Card

Search For Properties
Parcel ID Name

<table>
<thead>
<tr>
<th>Parcel ID</th>
<th>Card</th>
<th>Routing No</th>
<th>Location</th>
<th>Zoning</th>
<th>State Class</th>
<th>Acres</th>
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<tbody>
<tr>
<td>32C-169-001</td>
<td>1</td>
<td></td>
<td>228 PLEASANT ST</td>
<td>943 - n/a</td>
<td>0.230</td>
<td></td>
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Living Units: 0

Owner Information
Hampshire Educational Collaborative Inc

Deed Information
Book/Page: 6069/220
Deed Date: 2000/11/21

Building Information
Building No: 1
Year Built: 1994
No of Units: 0
Structure Type: Office Building - Low-Rise
Grade: C+
Identical Units: 1

Valuation
Land: $220,000
Building: $1,585,800
Total: $1,805,800
Net Assessment: $0

Sales History
Book/Page: n/a
Date: 2000/11/21
Price: $1,300,000
Type: Land + Bldg
Validity: K

Out Building Information
Structure Code Width Lgth/SqFt Year RCNLID
Asphalt Parking 0 14000 1994 $20,830

Exterior/Interior Information
Levels Size Use Type Ext. Walls Constr. Type Partitions Heating A/C Plumbing Condition Func. Utility Unadj. RCNLID
01-01 1x10749 Office Building Brick Stone Fire Resist Normal Hot Air Central Normal Good Good 540250
01-01 1x1249 Covered Hall Glass/Masonry Fire Resist Normal Hot Air Central Normal Good Good 41740

Building Sketch

[Image]
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$10/sF inclusive
exp 30% of income
$1,000,000

HEC Academy
pl 2
### Assessment and Sales Report

**Location & Ownership Information**

- **Address:** 228 Pleasant St, Northampton, MA 01060-3913
- **Map Ref.:** M:032C B:0169 L:0001
- **Zoning:** CB
- **Owner 1:** Hampshire Educ Collabor"v
- **Owner Address:** 97 Hawley St, Northampton, MA 01060-3377

### Property Information

<table>
<thead>
<tr>
<th>Use</th>
<th>Style</th>
</tr>
</thead>
<tbody>
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<td>Levels:</td>
<td>0</td>
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<tr>
<td>Year Built:</td>
<td>1994</td>
</tr>
<tr>
<td>Total Rooms:</td>
<td>0</td>
</tr>
<tr>
<td>Bed Rooms:</td>
<td>0</td>
</tr>
<tr>
<td>Full Baths:</td>
<td>0</td>
</tr>
<tr>
<td>Roof Type:</td>
<td>None</td>
</tr>
<tr>
<td>Heat Type:</td>
<td>None</td>
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<tr>
<td>Exterior:</td>
<td>Brick</td>
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<tr>
<td>Foundation:</td>
<td>None</td>
</tr>
<tr>
<td>Air Conditioned:</td>
<td>Yes</td>
</tr>
<tr>
<td>Condition:</td>
<td>Good</td>
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</table>

### Assessment Information

- **Last Sale Date:** 11/21/2000
- **Last Sale Price:** $1,300,000
- **Last Sale Book:** 6069
- **Map Ref.:** M:032C B:0169 L:0001
- **Land Value:** $220,000
- **Building Value:** $1,585,800
- **Misc Improvements:** $0
- **Total Value:** $1,805,800
- **Fiscal Year:** 2017
- **Estimated Tax:** $30,138.80

### Sales History

**Recent Sale #1**

- **Sale Price:** $1,300,000
- **Sale Date:** 11/21/2000
- **Buyer Name:** Hampshire Educational
- **Seller Name:** Pride Properties Inc
- **Lender Name:** Mortgage Ln & Tr Agre
- **Sale Book:** 6069
- **Sale Page:** 220

### Mortgage History

**Recent Mortgage #1**

- **Buyer Name:** Collaborative For Educati
- **Mortgage Amount:** $5,125,000
- **Mortgage Date:** 5/23/2012
- **Mortgage Book:** 10914
- **Mortgage Page:** 275

**Recent Mortgage #2**

- **Buyer Name:** Hampshire Edu College
- **Mortgage Amount:** $2,895,000
- **Mortgage Date:** 12/10/2003
- **Mortgage Book:** 7614
- **Mortgage Page:** 198

**Recent Mortgage #3**
<table>
<thead>
<tr>
<th>Buyer Name:</th>
<th>Hampshire Educational</th>
<th>Lender Name:</th>
<th>Florence Svgs Bk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mortgage Amount:</td>
<td>$650,000</td>
<td>Mortgage Date:</td>
<td>11/21/2000</td>
</tr>
<tr>
<td>Mortgage Book:</td>
<td>0</td>
<td>Mortgage Page:</td>
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</table>

**Recent Mortgage #4**

<table>
<thead>
<tr>
<th>Buyer Name:</th>
<th>Charles F Lyons</th>
<th>Lender Name:</th>
<th>Bankboston Western Ma</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mortgage Amount:</td>
<td>$220,000</td>
<td>Mortgage Date:</td>
<td>3/22/1996</td>
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<tr>
<td>Mortgage Book:</td>
<td>4846</td>
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<td>184</td>
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**Recent Mortgage #5**

<table>
<thead>
<tr>
<th>Buyer Name:</th>
<th>Pride Prop Inc</th>
<th>Lender Name:</th>
<th>Florence Svgs Bk</th>
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</thead>
<tbody>
<tr>
<td>Mortgage Amount:</td>
<td>$900,000</td>
<td>Mortgage Date:</td>
<td>9/27/1995</td>
</tr>
<tr>
<td>Mortgage Book:</td>
<td>4745</td>
<td>Mortgage Page:</td>
<td>108</td>
</tr>
</tbody>
</table>

*The information in the Public Record is set forth verbatim as received by MLS PIN from third parties, without verification or change. MLS PIN is not responsible for the accuracy or completeness of this information.*

- Over load does
- Parking in rear
- Sprinklered
- Full kitchen w/annual inspection

→ Shared driveway with Goodie Hoard
- Both props 1 mortgage

- Hawley St
- Ron Hodges wants Hawley St loan too
- Calab does rent land from Glowatski
Jaimie Fallon  
Goggins Real Estate  
Cell: 413 262-1050  
jfallon@gogginsrealestate.com  
MLS # 71614276 - Sold  
Commercial/Industrial - 5+ Residential  
129 Pleasant Street  
Northampton, MA 01060  
Hampshire County  
Directions: Pleasant Street across from Strong Avenue.

List Price: $1,800,000  
Sale Price: $1,600,000

Remarks
Located in the heart of Downtown Northampton, this two-story brick building has been operating as a residential single-room occupancy income property for many years. Originally built as a dormitory for Northampton Commercial College, the property has 58 rooms and three large common bathrooms. There is also an office and small onsite manager’s unit. The .74 acre lot has paved parking for 20 cars. There is also a large green space with trees and walkways to buffer the neighboring commercial building.

Building & Property Information

<table>
<thead>
<tr>
<th># Units</th>
<th>Square Ft.</th>
<th>Assessed Value(s)</th>
<th>Space Available For</th>
<th>Sublet</th>
<th>Lease</th>
<th>Lease Price Includes</th>
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<tbody>
<tr>
<td>Residential: 58</td>
<td>11,700</td>
<td>Land: $469,310</td>
<td>For Sale</td>
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<td>No</td>
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<tr>
<td>Office: 0</td>
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<td>Lease Type:</td>
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<td>Retail: 0</td>
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<td>Warehouse: 0</td>
<td>0</td>
<td># Buildings: 1</td>
<td>Sublet: No</td>
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<td>Manufacturing: 0</td>
<td>0</td>
<td># Stories: 2</td>
<td>Lease: No</td>
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<tr>
<td>Total: 58</td>
<td>11,700</td>
<td># Units: 58</td>
<td>Exchange: No</td>
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<tr>
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<th>Expansions:</th>
<th>Gross Annual Inc.</th>
<th>Gross Annual Exp.</th>
<th>Net Operating Inc.</th>
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<td>283788</td>
<td>164079</td>
<td>119619</td>
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<td>Ceiling Height:</td>
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</tr>
<tr>
<td># Restrooms: 3</td>
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<tr>
<td>Hndcp Accessible:</td>
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<td>Lot Size: 32,129 Sq. Ft.</td>
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<td>Acres: 0.74</td>
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<td></td>
<td></td>
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<tr>
<td>Survey: Yes</td>
<td>Subdivide: Possible</td>
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<td></td>
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<tr>
<td>Plat Plan: Yes</td>
<td>Parking Spaces: 20</td>
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<td>Lender Owned: No</td>
<td>Short Sale w/Lndr.App.Req: No</td>
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<td>Undgrnd Tank: Unknown</td>
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<tr>
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<td>Year Established: 1967</td>
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<td>Year Established Source: Public Record</td>
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<table>
<thead>
<tr>
<th>Construction: Brick</th>
<th>Location: Downtown</th>
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<tbody>
<tr>
<td>Parking Features: Open, 11-20 Spaces, Paved Driveway</td>
<td>Roof Material: Membrane</td>
</tr>
<tr>
<td>Site Condition: Level</td>
<td>Utilities: Public Water, Public Sewer, Natural Gas</td>
</tr>
</tbody>
</table>

Office/Agent Information

Listing Office: The Murphys REALTORS®, Inc. (413) 584-5700 Ext. 112  
Listing Agent: David A Murphy (413) 582-7190  
Team Member(s):  
Sale Office: The Murphys REALTORS®, Inc. (413) 584-5700 Ext. 112  
Sale Agent: David A Murphy (413) 582-7190  
Compensation  
Sub-Agent: Not Offered  
Buyer Agent: 2  
Facilitator: 2  
Compensation Based On: Net Sale Price

https://h3k.mlspin.com/MLS.Reports/Print.aspx?ms=71614276&evt=4&mod=4&app=1&MSID=CT008630&ip=174.63.41.244&SID=552796623&dsid=... 1/5
Northampton, MA: Commercial Property Record Card

Search For Properties
 Parcel ID Name
23B-035-001

Location
Zoning
State Class
Acres
61 LOCUST ST
342 - n/a
0.620

Owner Information
Sproul Jay W & William Truswell C/O Delro Llc

Deed Information
Book/Page:
Deed Date:
3373/224
n/a

Building Information
Building No:
Year Built:
No of Units:
Structure Type:
Grade:
Identical Units:
1
1985
0
Medical Office
C+
1

Valuation
Land:
Building:
Total:
Net Assessment:
$313,500
$887,500
$1,201,000
$0

Sales History
Book/Page Date
12414/275 2016/09/22
n/a 1975/06/01

Price
Type Validity
$1,230,000
Land + Bldg
0
$99,500
Land + Bldg
0

Out Building Information
Structure Code
Asphalt Parking
Light - Mercury Vapor, Pole

Width Lgth/SqFt Year RCNLD
0 18000 1984 $26,780

Exterior/Interior Information
Levels Size Use Type Ext. Walls Const. Type Partitions Heating A/C Plumbing Condition Func. Utility Unadj. RCNLD
B1-B1 1x3280 Multi-Use Office Wood Joist Normal Hot Air Central Normal Fair Fair 51060
B1-B1 1x1104 Support Area Frame Wood Joist Normal Hot Air Central Normal Fair Fair 31080
01-01 1x4384 Medical Center Frame Wood Joist Normal Hot Air Central Normal Fair Fair 116440
02-02 1x4384 Medical Center Frame Wood Joist Normal Hot Air Central Normal Normal Normal 143760

Building Sketch

http://www.northampton.univers-clt.com/view_property_C.php?account_no=23B-035-001&series_card=1
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Properties for Sale

1 20 Ladd Avenue, Florence, MA 01062

Property Details

<table>
<thead>
<tr>
<th>Price</th>
<th>Price Not Disclosed</th>
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<tbody>
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<td>Property Type</td>
<td>Industrial</td>
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<td>Property Sub-type</td>
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<tr>
<td>Property Use Type</td>
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<tr>
<td>Clear Ceiling Height</td>
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<tr>
<td>Features</td>
<td>Electricity/Power</td>
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<tr>
<td></td>
<td>Sprinklers</td>
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<tr>
<td>Status</td>
<td>Active</td>
</tr>
</tbody>
</table>

Property Notes

Property Description

Colebrook Realty Services, Inc. is pleased to offer for sale or lease an approximately 28,479 SF industrial mill building on 6.99 acres of land. The mill building has been meticulously maintained currently consisting of manufacturing and office space. Zoned Office Industrial (OI), the property also includes a single family, one (1) bedroom rental unit along with the potential for additional development on vacant land parcel. (Please note the property has a deed restriction limiting the mill building to commercial and/or industrial use.)

Location Description

The property is centrally located in Northampton’s Baystate’ section and is easily accessible to Routes 9 and 5.
### Property Details

<table>
<thead>
<tr>
<th>Property</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>$1,500,000</td>
</tr>
<tr>
<td>Building Size</td>
<td>40,868 SF</td>
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<tr>
<td>Lot Size</td>
<td>6.52 AC</td>
</tr>
<tr>
<td>Price/SF</td>
<td>$36.88 /SF</td>
</tr>
<tr>
<td>Property Type</td>
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</tr>
<tr>
<td>Property Sub-type</td>
<td>Flex Space</td>
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<tr>
<td>Property Use Type</td>
<td>Vacant/Owner-User</td>
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<tr>
<td>Occupancy</td>
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<tr>
<td>Year Built</td>
<td>1996</td>
</tr>
<tr>
<td>Clear Ceiling Height</td>
<td>16 FT</td>
</tr>
<tr>
<td>No. Dock-High Doors/Loading</td>
<td>12</td>
</tr>
<tr>
<td>No. Drive In / Grade-Level Doors</td>
<td>6</td>
</tr>
<tr>
<td>Features</td>
<td>Trailer Parking</td>
</tr>
<tr>
<td></td>
<td>Electricity/Power -</td>
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<tr>
<td></td>
<td>WMECO 1200 amps,</td>
</tr>
<tr>
<td></td>
<td>600 volts</td>
</tr>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
</tbody>
</table>

### Property Notes

**Property Description**

Main Building area of 36,508 SF; 22,110 SF industrial area and 14,398 SF office. There is also a garage building that is 4,160 SF.

### Location Description

Off Exit 26 I-91 & Route 2
Property Details

- Price: $3,000,000
- No. Beds: 160
- Building Size: 85,000 SF
- Price/Bed: $18,750 /Bed
- Property Type: Senior Housing
- Property Sub-type: Assisted Living Residences
- Property Use Type: Investment
- Status: Active

Property Notes

Property Description

85,000 square foot Vacant Former Nursing Home. 84 Rooms 100+ restrooms. Full Commercial Kitchen and 2 Kitchenettes.

Location Description

6 AC of land. Close Proximity to the Interstate. GREAT DEAL.
MLS # 72145788  - Active
Commercial/Industrial - Commercial
283 Long Plain
Whately, MA 01093
Directions: Rt 5/10 to Christian Lane to Long plain Rd

List Price: $650,000

Remarks
Amazing opportunity to own this commercial building on 4+ acres, of which 2 are certified organic. You are in the heart of farmland with beautiful views, yet it's only a 5 min drive to I-91 or Rt 5810. This property offers many possibilities - perfect for manufacturing, growing, distribution, and retail. Bring your business plan or talk about the current 12 yr old, successful dog care business. The original P&B building has a fully renovated 1st floor that is almost 10,000' specifically designed for this pet resort. There's indoor and outdoor play space, 20 pet suites for dogs and cats, quiet rooms, office and retail. Under this is a walk-out basement offering an additional 1,400' office unit, plus the owner has a special permit which allows up to 12 studio spaces to be utilized. Perfect for area artisian. Attached to the main building is a 4000' clear span steel butler building, built in 1997 with 2 loading docks and 20' ceilings is currently rented and has been used in the

Building & Property Information
Residential: 0
Office: 2
Retail: 1
Warehouse: 1
Manufacturing: 0

# Units: 7

Total: 17,857

Drive in Doors: Expansion Available
Loading Docks: 2
Ceiling Height: 243
Expandable: Yes

Living Area: 202,554 Sq. Ft.
Survey: Yes
Lot Plan: No

Office: 2
Retail: 1
Warehouse: 1

Features
Construction: Frame, Steel
Location: Rural, Free Standing
Parking Spaces: 25
Site Condition: Level, Open

Utilities: Public Water, Private Sewer, Three Phase

Gross Annual Inc:
Gross Annual Exp:
Net Operating Inc:
Special Financing:
Assoc:

Other Property Info
Disclosure Declaration: No
Exclusions:
Year Established: 2007
Year Established Source: Owner

Tax Information
Pin #: 
Assessed: $412,100
Tax: $6,428.76 Tax Year: 2017
Mill Rate: 15.60
Book: 5399 Page: 165
Cert:
Zoning Code: R4
Zoning Desc: Legal Conforming
Map: 20 Block: 42

Office/Agent Information
Listing Office: College REALTORS® (413) 549-5555 Ext. 2012
Listing Agent: Tami Gaytor (413) 522-4461
Team Member(s): 
Sale Office: 
Sale Agent: 

Listing Agreement Type: Exclusive Right to Sell
Entry Only: No

Showing: Sub-Agent: Sub-Agency Relationship Not Offered
Showing: buyer-Agent: Not Available, Showing Appointment Required, Other (See Special Showing Instructions)
Showing: Facilitator: Accompanied Showings, Appointment Required, Other (See Special Showing Instructions)
Special Showing Instructions: 48 hour notice, best time to see is at noon M-F, text or email agent

Firm Remarks
2nd deposit must be a bank check; Financial pre-approval required prior to showing.

Market Information
Listing Date: 4/14/2017
Days on Market: Property has been on the market for a total of 134 days
Expiration Date: 
Original Price: $665,000
Off Market Date: 
Sale Date: 

Listing Market Time: MLS# has been on for 134 days
Office Market Time: Office has listed this property for 134 days
Cash Paid for Upgrades: 
Seller Concessions at Closing: 

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### Property Description

Colebrook Realty Services, Inc. is pleased to offer for sale this approximately 58,443 SF industrial/office building on 8.68 acres of land in the Northampton Industrial Park.

### Location Description

Features include easy highway access, ample on-site parking and close proximity to I-91.
PRIME COMMERCIAL LOCATION! High Visibility and adjacent to Interstate 91 - over 20,000 vehicles pass this property per day and sit at the stop light directly in front of it! Easy access to I-91, King Street (Route 5), Route 9 and downtown Northampton. Both buildings are currently leased. Auto Body building is approximately 6,000 sq. ft. of office space and 11,028 sq. ft. of repair area. The other building, 48 Damon Road, is 1,730 sq. ft. of office space plus 6,350 sq. ft. of garage and storage areas. Property consists of two lots, the Auto Body has approximately 1.66 acres with 222.9 feet of frontage and the other lot is approximately .55 acres with 221.46 feet of frontage. Tenant has 15 days "right of first refusal" of any accepted offer. Tenants equipment and/or property, whether attached to the building or not, is not included in sale.

Building & Property Information

- # Units: 4
- Square Ft: 25,128
- Assessed Value: $835,490
- Land: $835,490
- Bldg: $902,410
- Total: $1,737,900
- Lease: No
- Exchange: No
- Sublet: No
- # Buildings: 2
- # Stories: 2
- 21E on File: Yes

Disclosures: Tenant has 15 day "right of first refusal" of any accepted offer. Tenants equipment, whether attached to the building or not, is not included in sale. Agent is related to seller. Three hydraulic pistons to be removed by seller prior to closing. A portion of the property lies within a Flood Zone.

Features

- Construction: Frame, Mason, Steel
- Location: Urban, Industrial Park, Free Standing, Interstate, Highway Access, Public Transportation
- Parking Features: Garage, 21+ Spaces, Paved Driveway, On Site
- Roof Material: Membrane, Asphalt/Composition Shingles, Metal
- Site Condition: Level
- Utilities: Public Water, Public Sewer, Natural Gas

Other Property Info

- Disclosure: Deed
- Exclusions: Tenants equipment and/or property, whether attached to the building or not, is not included in sale.
- Year Established: 1959
- Year Established Source: Public Record

Tax Information

- Pin #: 180-034-001 & 180-035-001
- Assessed: $1,737,900
- Tax Year: 2017
- Book: 4836
- Page: 309
- Cert: 3/6/1996
- Zoning Code: GB
- Zoning Desc: Legal Conforming
- Map: 18D
- Block: 034
- Lot: 001

Office/Agent Information

- Listing Office: Jones Group REALTORS®
- Listing Agent: Deborah Cahillane
- Team Member(s):
- Sale Office:
- Sale Agent:
- Listing Agreement Type: Exclusive Right to Sell
- Entry Only: No
- Showing: Sub-Agent: Sub-Agency Relationship-Not Offered
- Showing: Buyer-Agent: Call List Agent, Accompanied Showings, Appointment Required, Sign
- Showing: Facilitator: Call List Agent, Accompanied Showings, Appointment Required, Sign
- Special Showing Instructions: Businesses in operation, minimum 24 hours notice (as much notice as possible, preferred)

Firm Remarks

Tenant has 15 day "right of first refusal" of any accepted offer. Tenants equipment and/or property, whether attached to the building or not, is not included in sale.

Market Information

- Listing Date: 1/9/2017
- Days on Market: Property has been on the market for a total of 229 days
- Expiration Date: 
- Original Price: $2,900,000
- Off Market Date: 
- Cash Paid for Upgrades: 
- Seller Concessions at Closing: 
- Office Market Time: MLS# has been on for 229 days
- Office Market Time: Office has listed this property for 229 days
MLS # 72095313 - Active
Commercial/Industrial - Commercial

182 Mount Tom Rd
Northampton, MA 01060
Hampshire County
Directions: Mt Tom Rd is Rt 5.

List Price: $650,000

Remarks
Highly visible commercial property with 2 buildings on 13 acres suitable for many uses. Convenient location on major route across from I91 on/off ramps. Property also provides rental income from residential rental and billboards.

Building & Property Information

<table>
<thead>
<tr>
<th># Units</th>
<th>Square Ft</th>
<th>Assessed Value(s)</th>
<th>Space Available For:</th>
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</thead>
<tbody>
<tr>
<td>Residential:</td>
<td>1</td>
<td>805</td>
<td>Land: $304,050</td>
</tr>
<tr>
<td>Office:</td>
<td>1</td>
<td>4,080</td>
<td>Bldg: $268,700</td>
</tr>
<tr>
<td>Retail:</td>
<td>0</td>
<td>0</td>
<td>Total: $512,830</td>
</tr>
<tr>
<td>Warehouse:</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Manufacturing:</td>
<td>0</td>
<td>0</td>
<td># Buildings: 2</td>
</tr>
<tr>
<td># Stories: 2</td>
<td># Units:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total:

Disclosures: Subject to easements and restrictions. Additional income from billboard and residential rental. Floodplain. Square footage is approximate.

Drive In Doors: Expandable: Unknown
Loading Docks: Divide: Unknown
Ceiling Height: Elevator: Net Operating Inc:
# Restrooms: Sprinklers: Special Financing:
Hndcap Accessible: Railroad siding: Assoc.

Lot Size: 566,324 Sq. Ft.
Acres: 13
Survey: No
Pf. Plan: Parking Spaces: 100
Lender Owned: No
Short Sale w/Undr. App. Req: No

Traffic Count: Lien & Encumbrance:
Undeveloped Acres:
Easements: Yes

Features
Location: Urban, Free Standing, Interstate, Highway Access, Public Transportation
Parking Features: Open, Stone/Gravel, Paved Driveway, On Site
Roof Material: Shingle, Metal
Site Condition: Level, Open
Utilities: Public Water, Private Sewer

Other Property Info
Disclosure Declaration: No Excursions:
Year Established: 1920
Year Established Source: Public Record

Tax Information
Pin #: Assessed: $512,830
Tax: $8,287.33 Tax Year: 2016
Book: 9033 Page: 91
Cert:
Zoning Code: SC
Zoning Desc: Legal Conforming
Map: Block: Lot:

Office/Agent Information
Listing Office: Goggin's Real Estate, Inc. (413) 586-7000 Ext. 102
Listing Agent: Patrick M. Goggin (413) 586-7000
Team Member(s): Jaimie Fallon (413) 262-1050
Sale Office:
Sale Agent:
Listing Agreement Type: Exclusive Right to Sell
Entry Only: No
Showing: Sub-Agent: Sub-Agency Relationship Not Offered
Showing: Buyer-Agent: Call List Office
Showing: Facilitator:
Special Showing Instructions: Call Pat or Jaimie 413 586-7000. Showings Monday-Friday 9:00-5:00. 24 Hour notice.

Firm Remarks
Billboard rental - $5,724.50/Yr. 2.5 Yrs left on contract. Residential rental $800/mo. Month to month.

Market Information
Listing Date: 11/20/2016
Days on Market: Property has been on the market for a total of 176 day(s)
Expiration Date:
Original Price: $650,000
Off Market Date:
Sale Date:

Listing Market Time: MLS# has been on for 176 day(s)
Office Market Time: Office has listed this property for 176 day(s)
Cash Paid for Upgrades:
Seller Concessions at Closing:

Compensation
Sub-Agent: Not Offered
Buyer Agent: 2
Facilitator: 0
Compensation Based On: Net Sale Price

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CENTER FOR ASSISTIVE TECHNOLOGY (CCATT)

BOARD REPORT

September 27, 2017

MEMBERS of the Collaborative for Educational Services
Hampshire County
Amherst-Pelham Regional Schools * Amherst Public Schools * Belchertown Public Schools * Chesterfield-Goshen Public Schools
Easthampton Public Schools * Granby Public Schools * Hadley Public Schools * Hampshire Regional Schools
Hatfield Public Schools * Northampton Public Schools * Pelham Public Schools * South Hadley Public Schools
Southampton Public Schools * Ware Public Schools * Westhampton Public Schools * Williamsburg Public Schools
Smith Vocational & Agricultural School

Franklin County
Conway Public School * Deerfield Public School * Erving Elementary School * Franklin County Technical School
Frontier Regional School District * Gill-Montague Regional * Greenfield Public Schools * Hawlemont Regional
Leverett Public School * Mohawk Trail Regional * New Salem School * Orange Public School
Pioneer Valley Regional * RC Mahar Regional * Rowe Elementary School * Shutesbury Public School
Sunderland Public School * Wendell Public School * Whately Public School * Smith Vocational & Agricultural School

97 Hawley Street
Northampton, MA 01060
413.586.4900 | 413.586.0180 fax

Everyone is a learner
Overall

FY18 Planning Meeting

On August 2nd, the planning group met with the CCATT specialists (Dale Gardner Fox, Erin Travis, Jeanne Tuthill, and Eva Gibavic) and the Assistant to the Special Education Coordinator, Michelle Geoghegan, to look at the future of the center. The planning group consists of Bill Diehl, Barbara Siegel, Kathy Levesque, Sarah Molloy, and Sherry Smith. In this meeting, the group accomplished the below:

- Discussed current and future trends in Assistive Technology
- Discussed school district needs and challenges
- Envisioned potential offerings and services
- Decided upon top priorities to focus in the coming years and the low hanging fruit to work on this year, while considering the resources required for each endeavor

FY18 Priority Areas

After reviewing the final revenue data and finding out that CCATT’s loss in FY17 was smaller than we anticipated, we decided that looking at the revenue figures and billable versus non-billable hours did not take priority. The focus for CCATT will be on market research, marketing, and the service design of the below priorities:

Phase One Priorities (Fall)

- Implement grant/ESE funded trainings including Assistive Technology: From Access to Success in the Classroom, two year statewide Institute, and Introduction to Assistive Technology Planning Using the SETT Framework, for ESE personnel.
- Collaborating with internal departments, such as instructional technology, SEIS, Licensure, ELL, and Early Childhood - initial discussions in October
- Presenting at the Technology in Education Conference 2018 (TiE2018) - planning/identification by end October
- Creating and distributing new marketing - October/November
- Creating messaging and collateral about the guiding frameworks - existing service mix - (Communications, with review and approval by CCATT) October/November
- Begin development of parent education supports (these may initially include educational handouts and web content/resources to support families; and will be assisted and supported by CES Communications) - November/December
- Work on the education of districts, such as finding the intersection with Special Education Team Leader Institute (SETLI) communities of practice and figuring out the role of the Assistive Technology institute with the rest - this will be informed by market
research findings presented at the end of October, and a plan for the “education” of district teams and contacts developed by the end of 2017 and implemented in 2018

Phase Two Priorities (Spring)

- Research and design education and training (of teams-special education teachers, coordinators, and team leaders, IT personnel, ELL’s, paraprofessionals, etc.) to build district understanding of laws, challenges, solutions, frameworks, to be launched in FY19 or beyond.
  - AT endorsement certification
  - Annual “AT Update” event
  - Offer regulatory/compliance requirements training - administrators, tech, etc.
- Research and design new consultation models for Schools, Districts, and Organizations
  - Identifying model for offering and pricing Open Hours and incorporating PWC library
  - Working on dynamic assessment design
  - One-time program assessment (observation, assessment, coaching of teams)
  - Tech infrastructure assessments
- Expanded development of parent support and education

Next Step

We will provide an updated report for the January Board of Directors meeting based on the goals and next steps defined starting on page 3. In addition, we will set and present rates for FY19.
FY18 Marketing & Service Mix Goals

**Goal A**
Create and implement a market research plan.

**Objective 1:** Develop a market research plan by mid-August to target selected services and audience. Implement a research plan over the next 3 months. This will include but is not limited to: researching potential customer targets, customer needs, and what districts currently have in place for assistive technology, and will include research into potential areas for statewide reach. It will also identify some ways to leverage our upcoming assistive technology institute work to gain more insight into district and educator needs.

**Update:** The [market research plan](#) is completed. Market research will be conducted over the months of September and October to understand our target audience needs (including partners and schools) better, and begin to validate our concepts for new services. (See top priorities)

**Objective 2:** Look at what services competitors are providing and how they market themselves and their services, including sister collaboratives who offer these services.

**Update:** This research has begun, and will be completed by the end of September.

**Next Steps:** Provide findings as part of final market research report.

**Objective 3:** Conduct selected one-on-one interviews in October with customer stakeholders (See market research plan for specific audiences).

**Objective 4:** In October, convene meetings for mutual education and brainstorming about intersections with internal departments, such as instructional technology, SEIS, Licensure, and Early Childhood.

**Objective 5:** Field a survey to special education teachers, specialists, and team leaders, and assistive technology specialists, speech-language therapists working in school settings, and CCATT contacts in September.

**Objective 6:** In September, conduct a targeted survey to past clients identifying key reasons/benefits for referring, alternative options, evaluation and consulting experience and testing benefit of parent education support.

**Objective 7:** In September, conduct a targeted survey exploring potential for education about regulatory requirements, state of the AT industry, and infrastructure barriers - administrators, tech directors, etc.
Goal B
Create and implement a marketing plan and re-branding for the current services we offer.

Objective 1: Create an elevator speech for the services that CCATT provides so it is easier for potential clients to understand if they would benefit from the services.

Update: Draft Elevator Pitch and preliminary services description developed. This text will be provided to AT specialists between September 18-22 for review and feedback, and will form the basis of new marketing content.

DRAFT Elevator Pitch:
The CES Center for Assistive Technology’s nationally known specialists bring extensive classroom experience and expertise to their work with schools, districts, students and families. They regularly share best practices, emerging technology, and industry knowledge, offering education and technical assistance to member and non-member schools and districts. At a time when the industry is rapidly evolving, the Center’s consulting services for schools and districts build district capacity by strengthening teams with training, coaching, observation, and technical assistance, helping educators, therapists, and school specialists to stay on top of emerging technology and maximize participation and inclusion in the classroom.

Center specialists work directly with students and families, providing evaluations, recommendations, and the opportunity to explore and apply the right technology to meet their needs. They have particular expertise with alternative and augmentative communication, learning disabilities, autism, neurological and motor impairments, and executive functioning challenges.

What is Assistive Technology?
Assistive Technology is any device or program that makes life easier and improves the functional capabilities of individuals with capabilities. In a school setting, assistive technologies and resources empower students, especially those with disabilities, to access the curriculum and improve their learning. These can be required as part of a special education student’s IEP. AT can be high or low tech, hardware, software, or apps. It can be specialized learning materials and curriculum aids. Trained specialists help students and teams to match specific technology to specific needs.

Next Steps:
Obtain stakeholder review and feedback on marketing content, proceed to create updated marketing brochure and web pages.

Objective 2: Develop a marketing plan by the middle of October, and begin implementing the plan by the end of October. This will include, but is not limited to:
  • conducting active education within CES so that our consultants who work in districts better understand assistive technology;
  • developing a messaging plan to better support our consultants expert reputations here and across the state;
● Create plan for proactive in person presentations to school or district personnel.
● Prioritize our efforts on the adjusted service mix arrived at in the August meeting
● contacting local media personnel to the goal of expanding press coverage of sensory processing and integration work in the Valley

**Update:** The marketing plan will be completed by mid-October.

**Next Steps:** Marketing will meet with the CCATT team to review and adjust the plan as needed. New collateral and web content will be developed in October 2017, and distribution of messaging will begin by the end of October.

**Objective 3:** By the end of October, create a plan for presenting at the Technology in Education Conference 2018 that takes place on January 27th.

**Objective 4:** Create and distribute new marketing by the end of November.

**Objective 5:** Create messaging and collateral about the guiding frameworks by the end of November.

**Objective 6:** By the end of December, begin development of parent education supports (these may initially include educational handouts and web content/resources to support families; and will be assisted and supported by CES Communications).

**Objective 7:** Work on the education of districts, such as finding the intersection with SETLI communities of practice and figuring out the role of the AT institute with the rest - this will be informed by market research findings presented at the end of October, and a plan for the “education” of district teams and contacts developed by the end of 2017 and implemented in 2018.

**Goal C**
Create a plan for designing new services based on the market research.

**Objective 1:** Starting in March, create a plan for designing the new services that were decided upon as top priorities (listed on the first page). These plans should include validating the need for the service, a design of what it is and who would offer it, and a business plan.

**Objective 2:** By April, partner with the Development department to research specifically targeted funding opportunities that may be needed to support needed areas of growth.

**Objective 3:** By March, identify candidates for potential partnerships with similar service providers, and initiate conversations regarding same.
FY18 Staff Time & Operations Goals

<table>
<thead>
<tr>
<th>Goal A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determine how best to utilize staff’s non-billable time in order to stay efficient and effective.</td>
</tr>
</tbody>
</table>

**Objective 1:** Discuss resources needed to establish and market ourselves as staying on the cutting edge of technology. For instance, discuss how we would fund and if it will be expected of CCATT consultants to research new tools, helping schools/districts identify the right tools, and know how to use them.

**Update:** Technology changes so frequently that the CCATT specialists do not have time to keep up with all of it on a regular basis. What they can do is research technology on a student-by-student basis. They research and learn what works for a student by looking at the student’s environment and what fits those needs compared to what technology the classroom or school has and the culture and support they would receive from the school. They also advocate with vendors and discuss what vendors could provide or change in order to fit the students needs, which we could advertise to our clients.

**Next Steps:** While this is a core part of our value as industry experts, staying ahead of AT industry developments requires non-billed time available from consultants for their own professional development. In order to make such time available moving forward, we will examine current operations in the spring to identify a few key areas where administrative supports may be created feasibly to release consultant time. The cost of time spent to stay ahead of industry developments should be intentionally built into future services designed, which will take place in the Spring.

**Objective 2:** By the end of January, identify active steps to begin documenting all client work (contract and school referral) in Salesforce consistently. This will include determining if Michelle can offer administrative support for this process.

**Update:** Communications is working with each department to set up a timeline for implementing Salesforce. For CCATT, this will not occur until January.

The organized and efficient capture of data on CCATT customers, contracts, and business supports timely billing and our ability to understand the status of CCATT’s financial well-being at any time necessary. Hence, establishing data expectations in our CES systems (including SalesForce and Infinite Visions) will be an important part of establishing meaningful reporting for this Center.

**Objective 3:** In December, identify the most efficient and effective administrative support for CCATT data capture, billing, scheduling, etc.
OCCUPATIONAL THERAPY CENTER (OTC)

BOARD REPORT

September 27, 2017
Occupational Therapy Center (OTC)
September Board Report
September 27th, 2017

Overall

FY18 Planning Meeting

On August 7th, the planning group met with the two OTC specialists, Liz Etheridge and Noel Kesselheim, and the Assistant to the Special Education Coordinator, Michelle Geoghegan, to identify what we would prioritize to take action on in FY18. The planning group consists of Bill Diehl, Barbara Siegel, Kathy Levesque, Sarah Molloy, and Sherry Smith. In this meeting, the group accomplished the below:

- Identified the services we currently offer and how we differ from other providers
- Reviewed the billing data from FY17
- Discussed potential ways to increase income and efficiencies
- Agreed upon which areas to prioritize in FY18 (listed below)

FY18 Priority Areas

After reviewing the current challenges that OTC is facing, the group agreed that the first priority should be to focus on improving the billing procedures and policies so that we can be confident we have an efficient and effective business model before we grow our clientele. Concurrently, we will carry out market research and work on marketing our current services mix. Phase two will focus on creating a plan for expanding our capacity and designing new services.

Phase One Priorities (Fall)

- Reviewing current pricing structure, billing policies, and billing procedures
- Increasing administrative support
- Exploring what value proposition/service package we have for schools and districts

Phase Two Priorities (Spring)

- Assessing the methods and means for working with Early Childhood around workshops and playgroups.
- Evaluating hiring a new therapist and looking at the feasibility of a mentoring program
- Looking into potential partnerships
- Marketing to grow business

Next Step

We will provide an updated report for the January Board of Directors meeting based on the goals and next steps defined starting on page 3. In addition, we will set and present rates for FY19.
Data Gathering & Analysis of FY17 Billing

Data Gathering and Analysis of FY17 Revenue Streams

Using the billing sheets for Liz and Noel’s work in FY17, Sarah aggregated the data into two spreadsheets and created a summary of the findings related to revenue streams and billable vs. non-billable hours. Liz and Noel also gathered and presented data on the number of clients and evaluations. During the meeting on August 7th, the group went over and discussed these findings. Below is a brief overview of each analysis.

Summary of Findings

- Between both Liz and Noel’s clients, OTC served private clients and school districts equally in terms of hours spent. In FY17 they spent about 750 billable hours with private clients and 744 with school districts between the two of them.
- Most of their work was directly with students as opposed to doing consultations.
- They provided treatment and consult to 61 individuals total. Of these, 35 were private clients and 27 were from school districts (Northampton, South Hadley, Gill/Montague, PVPA, Berkshire Hills Music Academy, BART, Granby).
- They conducted 26 evaluations overall. Of these, 19 were for private clients and 7 were for school districts (Springfield, West Springfield, Northampton, Worthington, Granby, BART).
- They provided programmatic consult to the following schools:
  - Common School, Amherst, 15 hours
  - Center School, Greenfield, 30 hours
  - Northampton School district consult and 2 workshops, 8 hours
  - Granby School district 20 hrs
  - Support Network for Families of Western Mass, 3.5 hours
  - Berkshire Hills Music Academy, 2.5 hours
  - UMass Pre-school program, ½ day all staff training

Data Gathering and Analysis of Billable vs. Non-Billable Hours

Summary of Findings

- On average, Liz and Noel spend about 75% of their time on billable tasks and 25% on non-billable tasks.
  - Liz’s average work week is 25 hours, 7 of which she spends on non-billable tasks
  - Noel’s average work week is 35 hours, 9 of which she spends on non-billable tasks
- The majority of Liz’s non-billable tasks were daily caseload support, such as taking notes, answering phone calls or emails from clients, and billing. She also spends a lot of time travelling to clients.
- The majority of Noel’s non-billable tasks were OTC admin work, billing, intakes, and clinic cleaning.
## FY18 Staff Time & Operations Goals

### Goal A

**Update our billing policies and procedures in order to become more efficient and effective.**

### Objective 1:

**Work with the Business Office in September to establish a more efficient billing process.**

In the immediate term, begin recording all private pay clients in Salesforce for billing and CRM purposes.

**Update:** Sherry, Michelle, Liz, Noel, Barbara, and Sarah met after the large group meeting to discuss the current billing policies and procedures and came up with the steps that are contained in this goal. Accomplishing these objectives will bring us towards a more efficient billing process. Sarah also met with Liz and Noel to coordinate filling out their billing sheets in a standard way to make billing and analyzing the data in the future easier and more accurate. An example of this is how to record cancellations and how much we charged for it.

**Revised Objective 1:** Work with the Business Office to establish a more efficient billing process and evaluate the processes in December.

**Next Steps:** In December, we will look at October’s billing and see if it lines up with the specialists’ billing sheets. Noel will also reach out to her contact at Watertown to see if they are willing to share their billing policies and procedures.

### Objective 2:

**After analyzing staff time and determining where there is available capacity, identify active steps to begin documenting all client work (private pay and contract work) in Salesforce consistently.**

**Update:** Communications is working with each department to set up a timeline for implementing Salesforce. For OTC, this will not occur until January.

**Next Steps:** Determine who will be recording the data in Salesforce by November.

### Objective 3:

**Starting on September 1st, charge new private clients who are not from a member district, the non-member price. Notify clients no later than August 1st about this change and inform them they will be grandfathered in for one year.**

**Update:** OTC currently only has one private client who does not belong to a member district so charging these clients the non-member price will not increase our income significantly at this point in time.

**Next Steps:** Review policies and communications with customers to ensure this new policy is integrated and clearly communicated. Collect data and review/assess impact 1 year out from change in terms (against baseline year prior to change).

### Objective 4:

**By the September Board meeting, assess feasibility of consistently charging for chart review and treatment plan development when picking up clients with outside evaluations.**
Update: After the initial discussion with the Board members, OTC started consistently charging for chart review and treatment plan development when picking up clients with outside evaluations. They also have it in their policy to charge for an additional hour at the normal rate of $99/hour.

Next Steps: Review policies and communications with customers to ensure this new policy is integrated and clearly communicated. Collect data and review/assess impact 1 year out from change in terms (against baseline year prior to change).

Objective 5: By the September Board meeting, assess feasibility of eliminating the lower cost private evaluation options.

Update: This goal has been eliminated because it is no longer applicable as initially stated. After the initial discussion with the Board members, OTC eliminated the lower cost evaluation option last year, and therefore this will no longer be an option for clients.

Objective 6: By the September Board meeting, assess feasibility of changing the cancellation policy.

Update: After discussing the various cancellation situations and when they would bill full price, half price, or nothing at all, the group came to the conclusion that with their clientele the situation is more complicated than whether or not the client gave enough notice. Accordingly, we will look at what the current industry standard is and determine from there if we will change our policy.

*Revised Objective 6: By the end of October, determine if we will change our cancellation policy and adjust the policies accordingly. In addition, add a list of the various emergency conditions in the policy itself so clients are aware from the beginning when they will be charged full price, half price, or not at all.

Next Steps: Noel will reach out to other agencies (e.g. Watertown, Easter Seals, etc.) to see if they are willing to share their cancellation policies and procedures.

Objective 7: By the January Board meeting, determine if we will change our pricing structure for evaluations after analyzing how much actual time is spent doing evaluations compared to how many hours we charge clients.

Update: This is a new goal that was added based on findings around the time spent on caseload support that we do not bill for.

Next Steps: Liz and Noel will be keeping track of how much time they spend on each piece of an evaluation and report to the group what the average is so we can compare that to what we are currently charging.

Objective 8: By the January Board meeting, determine an effective model for charging for email/phone consultations and notify clients of the change.

Update: This is a new goal that was added based on findings around time spent on answering client emails that we would normally bill for if they were a face-to-face discussion.
Next Steps: By November, meet to discuss what an email/phone consultation billing model should look like.

Objective 9: By the January Board meeting, as an agency, reach a conclusion on how and when we will charge clients for travel time and when travel counts towards a specialist’s work day.

Update: This is a new goal that was added based on findings around when we charge clients for travel time and when travel time is counted towards a specialist’s workday.

Next Steps: By December, research the guidelines of other service provider agencies for when travel time is included in an employee’s work day.

Goal B
Increase administrative support in order to increase the time available for billable tasks.

Objective 1: After accomplishing the data analysis of staff time spent on billable hours, establish goals for FY18 and beyond for percent growth of billable hours over our baseline.

Update: The goal for FY18 is to increase the amount of billable time that was previously not billed for (e.g. additional caseload support such phone/e-mail consult, travel time, etc.) by determining how to best bill for these services as stated in Goal A.

Next steps: By the end of November, determine the percentage of administrative tasks that are NOT billable, and then determine the logistics involved in handing over these tasks as appropriate; this will be related to Objective 2 below.

Objective 2: By the end of September, analyze the current intake procedures and develop a more efficient process. This will include determining if Michelle can offer administrative support for this process.

Update: Developing a more efficient intake procedure will come out of the analysis of non-billable tasks that the specialists perform and what can be re-assigned to someone other than the specialists.

*Revised Objective: By the January Board meeting, after analyzing the time spent on non-billable tasks, make recommendations on who else can take on those tasks and the logistics involved in doing so.

Next Steps: For two weeks, Liz and Noel will be tracking their time spent on non-billable tasks and making a note if the task can be done by someone else.

Goal C
Determine how to increase our capacity for providing treatment by recruiting new staff.

Objective 1: During the meeting in August with OTC staff, discuss the possibility of developing a lower cost offering through the implementation of a mentorship program for graduate level students needing
clinical practicum. In September, start developing a business plan for this model with the Business Office and discuss with Early Childhood the benefits to their clientele.

**Update:** During the August meeting we discussed the possibility of hiring a new therapist and for that therapist to be a graduate level student. The main issue that we will have to grapple with is balancing having clients ready for the therapist before we hire one, but also having a therapist ready to take on those clients.

*Revised Objective 1:* Determine the feasibility of developing a mentorship program by March. This includes discussing whether or not this will fill a need for Early Childhood.

**Next Steps:** By the January Board meeting, accomplish preliminary research on the feasibility of developing a mentorship program.
FY18 Marketing & Service Mix Goals

Goal A
Create and implement a market research plan.

Objective 1: Develop a market research plan by the end of August to target selected services and audiences; implement the plan over the next 3 months. This will include, but is not limited to, researching: our current client base and the potential for this audience’s growth; potential new clients; client needs, such as the demand for delivering expanded training/technical assistance on key areas of expertise, and and will include research into potential areas for statewide reach.

Update: Coordinated Market Research plan is completed for both OTC and CCATT, and work to implement will continue through September and October.

Next Steps: Implement competitive scan, surveys, and stakeholder interviews.

Objective 2: Look at what competitors are providing and how they market themselves and their services. Based on these findings, consider focusing branding and messaging on Sensory Processing rather than all of our other areas and services, since this expertise is unique in this area.

Update: A preliminary review of occupational therapy services offering sensory integration has begun, and is continuing. This review will be completed by the end of September. Recommendations concerning naming of the Center and positioning are captured in the elevator pitch under Goal B, Objective 1, and preliminary draft text for an updated brochure and web content is well underway.

Next Steps: Completion and reporting on competitive review/survey development and launch.

Objective 3: Conduct selected one-on-one interviews in October.

Objective 4: Convene meetings for mutual education and brainstorming about intersections with Early Childhood in October.

Objective 5: Field a survey to past, current, and potential customers in September.

Objective 6: In September, conduct a targeted survey identifying key reasons/benefits for referring, alternative options, evaluating experience and testing benefit of parent education support.

Goal B
Create and implement a marketing plan and re-branding for the current services we offer.

Objective 1: Create an elevator speech for the services that OTC provides so it is easier for potential clients to understand if they would benefit from the services, especially in regards to what sensory
processing issues look like and what treatment can do for them. This may also include creating more parent/family-friendly marketing materials to explain these issues.

**Update:** Draft Elevator Pitch and preliminary services description developed. This text will be provided to OTC specialists for review and feedback, and will form the basis of new marketing content.

**DRAFT Elevator Pitch:**

The **CES Occupational Therapy and Sensory Integration Center** is a service offered by the Collaborative for Educational Services. The Center offers a full range of evaluation and treatment services for children and youth, as well as consulting and technical assistance for schools, districts, and community organizations. Our senior therapists are licensed occupational therapists with extensive experience in pediatrics, and specialized training in evaluation and treatment of sensory processing and regulatory issues, and are SIPT (Sensory Integration and Praxis Test) certified.

The Center has become an area leader in recognizing and meeting the special needs of those with sensory processing challenges, including children and youth with autism disorders and other developmental disabilities. We collaborate closely with home and school teams, providing therapy to address all of the settings and tasks encountered in daily life.

The Center’s therapeutic space offers state-of-the-art equipment and a safe, playful environment; with personalized treatment opportunities not always available in a hospital, school, or home setting. The Center’s main room provides a variety of movement experiences; and tactile materials and small manipulatives help address sensory and fine motor needs. A separate evaluation room provides quiet, focused space for an accurate and thorough assessment of specific needs.

**Next Steps:** Obtain stakeholder review and feedback on marketing content, proceed to create updated marketing brochure and web pages.

**Objective 2:** Develop a marketing plan by mid-October and implement the plan starting in November. This will include, but is not limited to:

- contacting local media personnel to the goal of expanding press coverage of sensory processing and integration work in the Valley
- informing superintendents that we are giving families coming from their districts a discounted, member price so they are aware of this additional benefit of being members
- conduct active education within CES so that our consultants who work in districts better understand sensory processing disorders and integration.
- Create plan for proactive in person presentations to school or district personnel.
- prioritize our focus on the adjusted service mix arrived at in the August meeting
- Create parent/family education about sensory processing and integration to support our own educational efforts as well as schools.

**Update:** We will redo our marketing story to focus more on sensory integration, explaining what it is and presenting a target audience-specific package of services that speaks to our different client bases (including potential partners). And highlighting specific expertise of our consultants.

**Next Steps:** Completion of proposed marketing plan, presentation to OTC stakeholders
**Objective 3:** After our services are determined, schedule and recruit visitors for a spring open house at OTC, and, as appropriate, make in-person presentations to school or district personnel.

**Next Steps:** Identify timing and content for spring open house and school presentations. Create process plan.

![Goal C]

Create a plan for designing new services based on the market research.

**Objective 1:** By March, determine the feasibility of offering the OTC space for rental in the Spring.

**Objective 2:** By March finalize and describe ongoing consult model and pricing for this and other new school/district technical assistance services.

**Objective 3:** In the spring of FY18, assess the cost-benefit and feasibility of offering an initial workshop / training such as open enrollment or on-site training for FY19.

**Objective 4:** By February, assess the methods and means by which we might partner with the Early Childhood department around workshops and playgroups.

**Objective 5:** By March, partner with the Development department to research specifically targeted funding opportunities for FY19 that may be needed to support needed areas of growth. Among these may be funding for updating and expanding the OTC lending library.

**Objective 6:** For FY19 identify candidates for potential partnerships with similar service providers, and initiate conversations regarding same (including but not limited to: Whole Children, Springfield College, and the Cutchins Center).
EXECUTIVE DIRECTOR

REPORT TO THE BOARD OF DIRECTORS

September 27, 2017
EXECUTIVE DIRECTOR’S REPORT TO THE BOARD OF DIRECTORS
September 27, 2017

Dear CES Board Members:

Welcome to the first CES Board of Directors meeting for 2017-2018. We had a very busy summer at CES, as evidenced by the Interim report I sent towards the end of August. I am including that report in the Board packet, since we have a number of new members who had not seen it.

Over the last month, we started the new school year at many programs across our member districts, including special education programs (e.g. HEC Academy, CBWE), early childhood/parent centers and programs, afterschool programs, and alternative education (Mt. Tom and connecting activities); in 2015-16, these programs served over 5,600 children, youth and families and we hope to continue that level of service. We also continued with professional development workshops, licensure courses, and Professional Learning Communities; in 2015-16, over 8,100 educators participated. Across the state, we also opened the school year at Department of Youth Services education programs and at Special Education in Institutional Settings sites. As a critical part of launching the school year, CES provided orientation and professional development to our educators in these many programs.

I have also been busy with outreach activities. I finished meeting with almost all of the member School Committees in early September, and I met or have meetings planned with new superintendents and new state-level partners; in that regard, we have the challenge and opportunity of major leadership changes at three of our key partner agencies, namely the Commissioner of Education at DESE, the President at Commonwealth Corporation, and the Director of Educational Services at DYS. I continued to serve on the state’s Safe and Supportive Schools Commission, and chaired the Equity working group. I continue to serve on the Executive Committee for the MA Organization of Education Collaboratives (MOEC). I have been the regional liaison for statewide collaborations with ESE, which I am pleased to report are growing. In addition, I am one of the presenters at a session in this year’s MASS/MASC conference about “Improving Outcomes for Students Living in Poverty: The LEAP Initiative.”

There’s much work ahead of us this year. While continuing our many successful programs and services, we’ll also be completing implementation of our re-organization as well as our new business, human resources, and data/customer service systems; launching a special education program for the northern Berkshires; and expanding our professional development work in key areas. We’ll continue our enhancements of CES internal practices, and keep a strong focus on promoting collaboration, inclusiveness, social justice and equity. We’re developing stronger ties with our member districts, our sister collaboratives, and our regional and state partners. And, most important of all, we’re determined to expand and deepen the core work we do on behalf of our members.

1 We are compiling the numbers for 2016-17 in preparation for the December annual report to ESE and the Board
I am truly honored to work with so many people who are undauntedly determined to make positive impacts on all the lives they touch. I look forward to a productive year ahead!

On this and the following pages are a few highlights of CES’s recent work (see also the Summer Interim Report). The highlights are arranged according to our strategic goals.

Best regards,

[Signature]

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**STRATEGIC GOAL 1: MEETING MEMBER DISTRICT NEEDS** by collaborating to build needed strength and capacity based upon recognition of current and upcoming demands and trends in education.

**SELECTED / REPRESENTATIVE ACTIVITIES**

- A full slate of **fall professional development workshops** has begun, primarily serving **educators in our member districts**. **Nineteen PD** workshops for K-12 educators are scheduled and have been publicized through email, flyers, and on our website. Among the topic areas addressed include English Language Arts; Literacy Development; Educational Technology; Science; Struggling Learners; Social Justice and Equity; Social Emotional Learning; ways to support Special Ed students and English Language learners in the classroom; and Attorney Tate’s presentation on Legal Issues for Schools. Please note: **Board Members can attend CES workshops, at only the cost of meals and materials, if there is room available.**

- Our Early Childhood Department is holding multiple workshops in **several locations in our region**. These include: a) Building Success: Supporting Children with ASD in an Inclusive Setting; b) Identifying and Supporting Children with Special Needs in your Program; c) Strategies for Addressing Delayed Communication Development in Young Children; d) Understanding and Addressing Young Children’s Behaviors; e) Sensory Processing: Creating a Sensory Sensitive Classroom, Curriculum & Experience for Young Children; f) Enhancing Infant Curriculum; and g) Early Childhood: An Important Time to Introduce Social Justice and Diversity to Young Children.

- Thanks to the initiative of Board Member **Cathy Englehardt**, our Early Childhood Department (and Cathy) are working on plans for a conference or other event for **grandparents who are raising their grandchildren**.

- The **Franklin and Hampshire County Superintendents** began their monthly convenings, organized and facilitated by CES. In addition, the **Connecticut Valley Superintendents Roundtable (CVSR)**, also organized by CES, held its first meeting in September; CVSR includes all the superintendents in Franklin, Hampshire, and Hampden Counties.

- A new web page has been created on the collaborative.org website, **housing social justice in education resources** that may be of help in your own programs and efforts. These resources will be continually added to as we grow a library that we hope will help to
support our **member schools and districts**. We invite you to visit the page at [www.collaborative.org/sje-resources](http://www.collaborative.org/sje-resources).

- We have over 20 new site-based contracts since July 1, 2017. We are proud to be able to provide **custom on-site PD for our members** and non-members in the Pioneer Valley.

- We will continue to support the **Easthampton Public Schools** by creating and facilitating an Advisory Committee to guide the District’s SJE work for the 2017-18 school year.

- You should be seeing announcements very soon for the **SPIFFY Coalition** and Hampshire HOPE meeting on October 16th. District and school personnel in **Hampshire County** are invited to attend to hear about the **2017 Hampshire County youth survey data results**, and explore how current culture and policy shifts may be influencing youth substance use locally--both positively and negatively. The meeting will be held from 11 - 1, at the Hadley Farms Meeting House.

- In our Title III Consortium, many students were served over the summer through individual and small group tutoring, in which ELs were assisted with reading and math skills. Northampton Public Schools hosted their Title III-supported family engagement event on Aug. 29 at Jackson Street School. Our current Title III consortium **serves 19 districts (including Amherst-Pelham Regional School District, Belchertown Public Schools, Easthampton Public Schools, Frontier Regional and Union #38 School Districts, Granby Public Schools, Greenfield Public Schools, Hadley Public Schools, Hampshire Regional School District (and Westhampton School, Williamsburg School, Southampton School), Northampton Public Schools, Ralph C. Mahar Regional School District, South Hadley Public Schools, and Ware Public Schools)**.

- CES will provide **seven SEI courses** this fall. Successful completion of this 13-week course confers the SEI Endorsement. Three of these are open-enrollment courses at CES (one for administrators and two for teachers.) In addition, we currently have 4 on-site Teacher SEI courses in Springfield and West Springfield.

- Our Alternative Youth Programs department applied for a **STEM Paid Internship grant in partnership with the Franklin-Hampshire Regional Employment Board**. If awarded, the grant would support 20 paid STEM internships throughout FY’18. CES is well positioned for this grant, having started, two years ago, the Hampshire County STEM Employer Action Group (EAG) to create new connections between area STEM businesses and local high school students. Last year the STEM EAG resulted in a number of paid life sciences internships for high school students, as well as after school science workshops and attendance at a computer programming hack-a-thon at Hampshire College. Already the STEM EAG has resulted in strong connections between area high schools and the University of Massachusetts-Amherst, among other businesses and institutions.

- Alternative Youth Programs also oversees the Hampshire County **Perkins Consortium** and is on track to submit the FY’18 Perkins grant in the next few weeks. The grant includes **Amherst, Easthampton, and South Hadley**.

- The Connecting Activities Program, which supports **School-to-Career activities in Hampshire County**, anticipates receiving additional funding from the state this year. A greater portion of CA funding will be directed toward the establishment of STEM Employer Action Group connections in the community, in addition to continuing to support career
speakers, jobs shadows, internships, career days, employer recruitment conferences, and other workplace skills development opportunities for students.

- **Ken Pransky is retiring** on September 29, 2017. Ken has been with CES for 9 years and his focus area has been English Language Learners, Social Emotional Learning, Executive Functioning, Academic Language, and Brain Based research. Ken has made significant contributions to CES and he will be missed.

- **Jose Lugo has been hired as our new Instructional Designer.** His start date will be 9/25/17 and he will be working on transitioning all of the CES courses from Moodle to Canvas, our new learning management system. Canvas will allow for greater flexibility for instructors and students. The transition to Canvas will allow us to increase our online PD offerings to better meet the needs of our members.

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**STRATEGIC GOAL 2: FOSTERING THE SUCCESS OF CHILDREN, YOUTH AND FAMILIES, WITH A FOCUS ON THOSE PLACED AT RISK** – by providing educational programs, policies and practices that foster the success of families, youth and children.

**SELECTED/REPRESENTATIVE ACTIVITIES – Early Childhood**

**Assessment for Responsive Teaching (ART)**
- On September 1 we presented Using Observation Skills for Planning and Assessment in Canton to 23 educators. A Teaching Strategies GOLD course is scheduled to start on September 30 in Fitchburg.
  - Three Spanish/English bilingual instructors will attend a Teaching Strategies GOLD Accreditation Program on September 25 and 26. Once accredited, these instructors will increase our capacity to teach this course in Spanish.
  - We have scheduled our first Teaching Strategies GOLD Hands-On Support Professional Learning Community in Spanish to follow the Fitchburg GOLD training. This PLC will provide practice in using the tool with real data that educators collect.
  - We are busy scheduling courses for the fall. Fourteen courses have already been scheduled to occur in October and November.

**BHN-Early Childhood Mental Health (ECMH)**
- number of cases currently open: 14 children and families and 2 classrooms
- number cases closed (August and Sept): 4
  - expulsions prevented: 4
  - number of programs currently being served: 12

**Strong Foundations for Young Children (SFYC)**
- Exploration continues on a possible narrowing of eligibility requirements to help focus programming on families with no access to other ECMH services and in expanding these services to all of Hampshire County instead of limiting it to only Easthampton and Ware.

**Coordinated Family and Community Engagement (CFCE)**
- Family Centers and playgroups are opening this month (except Ware and Belchertown which open in October).
  - **Puzzle of Parenting** calendar is available with our workshops next month.
  - First CFCE Programming Team meeting is next week.
• Hatfield Playgroup is now Thursdays at Hatfield Library.
• Spanish programming partnership with Amherst Family Outreach has begun.
• We participated in Amherst/Pelham First Day community event celebrating the beginning of the school year.

Parent Child Home Program – Family Child Care (PCHP-FCC)
This program provides services to family child care providers in our 17 CFCE towns/communities service area, and we have been recently approved to serve Northampton and Hadley as well. We are currently recruiting 6 family child care programs for programming services to begin in October.

Early Childhood Professional Development
Our Early Childhood Professional Development Calendar is now available. Upcoming topics include: Understanding and Addressing Young Children’s Behaviors, Introducing Social Justice and Diversity to Young Children, Sensory Motor Development in Young Children, Social Emotional Learning and Approaching to Play and Learning Standards Online course, STEM: Creativity Imagination and Big Ideas, Having Difficult Conversations with Parents, and Promoting Brain Building through Curriculum.

SPECIAL EDUCATION

Current Enrollment:

● (34) Total; Academy = 31, CBWE = 3; (1) Pending Referral

MEMBERS: (13) Districts, (22) Students

○ 65% Total enrollment
○ 71% Academy Enrollment

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● NON-MEMBERS: (6) Districts, (12) Students

○ 35% Total Enrollment
○ 39% Academy Enrollment
○ 100% CBWE Enrollment
HEC Academy:
- We welcomed two new clinicians.
- We also welcomed three clinical interns: Nayah Mullings and Emily Coffin from Smith College School for Social Work; Kathleen “Katy” Reid from Springfield College School for Social Work.
- We had a successful Chromebook rollout!
- During orientation week, staff began a series of trainings with Safire and Casey regarding Google Classroom and how to implement this platform in classes. Staff are really committed to Google Classroom and finding creative ways to implement it in the classroom (i.e., math using graphic tablets to do math computation on computer).
- One Academy student is attending HCC for dual-enrollment this semester; he was awarded a grant from HCC to pay for his tuition.

Mount Tom:
- Eight students are enrolled at Mount Tom; this includes six member districts:
  - (1) Greenfield
  - (4) Hampshire Regional
  - (2) Mahar
  - (1) Non-Member: Hampden-Wilbraham
- Students engaged in Summit Learning Platform

Assistive Technology Grants:
- The CCATT team is working on a year-long institute that will begin October 4 Assistive Technology: From Access to Success in the Classroom
  - The grant is designed for (15) two-person teams of one special educator and one general educator.
  - The focus will be on accessing and using a variety of AT tools and software within the general education setting.
- We will be presenting a 3 hour workshop to a group of DESE staff on 9/28 Introduction to Assistive Technology Planning Using the SETT Framework
  - The workshop will focus on an introduction to the framework that helps guide AT decision-making, as well as a brief introduction to AT tools, and, barriers to implementation.

Berkshires Project:
- In the process of getting agreements and leases finalized with partners
- DESE Application in process of getting finalized, and should be submitted in October
- Planned opening of January 3, 2018; currently anticipating 6-8 students, per the Berkshires superintendents
- Jodi Drury, Project Manager, is actively engaged in looking for staff for the program

SELECTED/REPRESENTATIVE ACTIVITIES – Special Education in Institution Settings

- SEIS has successfully implemented all aspects of the three year contract and an annual renewal has been awarded by the Department of Elementary and Secondary Education.

- Over the summer SEIS leadership has engaged in leadership sessions with Therese Ross. It was a wonderful exercise of building understanding about the contract with our ESE partners. We will continue to engage in four additional sessions to increase our leadership skills over the course of the school year.

- The SEIS program had a successful start to the school year. The SEIS teachers returned on August 30th to launch the year with Orientation Day. Teachers were introduced to all of the CES/SEIS policies and procedures, understanding the updates to the incident reporting protocol, learning about the professional development system, and exploring updates to the Teacher Evaluation System. New teachers had a successful introduction with the first session of the New Teacher Induction Program.

- The first few weeks are underway and teachers are actively engaged in planning to meet their student needs. In programs, teachers are launching their Learning Teams. They will use an updated Google Drive Architecture which will produce weekly summaries for all team members. Teachers have begun submitting coaching requests in anticipation of the coaching corner sessions. Teachers have been utilizing the Aspen virtual hours to get support on accessing documents in Aspen and completing their virtual time sheets.

SELECTED/REPRESENTATIVE ACTIVITIES – Department of Youth Services (DYS)

- We provided professional development at the start of the school year for more than 200 special and general education faculty who work with some of the most vulnerable youth in Massachusetts. These outstanding educators joined together to rejoice the transformative impact of their collective work and to renew their commitment to supporting the future readiness of the students in their classrooms. Two days of Professional Development intended to complement our rollout of the math and science instructional guides were provided during the week of September 11th. Instructional Coaches and selected managers and teachers used learning stations such as Robotics, Coding, and BreakoutEDU to create a highly energizing, effective, launch to our school year.

- DYS is partnering with a consortium of Institutes of Higher Education to apply for the Executive Office of Higher Education Early College designation. We are hopeful this designation will facilitate more of our youth to obtain college credits while in the custody of DYS, in residence or in their home districts.

- Our DYS program, with outstanding support from our communications team, has completed the work to write, design, and publish the new 2017 DYS Math Instructional Guide. Aligned with the 2017 Massachusetts Mathematics Curriculum Framework and the Common Core State Standards (CCSS), the 555 page Guide includes Exemplar Units for Algebra 1, Geometry, and Algebra 2. The Guide is available for download and use by all and any teachers interested in this material for their own classrooms, inside or outside of DYS.
classrooms. Interested parties may visit the CES website at Programs/DYS/Instructional Guides for a look.

**STRATEGIC GOAL 3: DEVELOPING EXEMPLARY EDUCATORS** - through the delivery of high-quality and distinctive professional development.

**SELECTED / REPRESENTATIVE ACTIVITIES (PLEASE ALSO SEE GOAL 1)**

- In addition to the 19 professional development offerings this fall, we are planning spring open-enrollment learning opportunities.
- The first Cohort of EEPLI (Educational Equity and Personalized Learning Institute) will begin on October 11. We are excited to bring PD in the area of Personalized Learning to our members.
- As described in the August report, CES was awarded additional three-year contracts with ESE to deliver the **Special Education Teacher Leaders’ Institute (SETLI)**, a program to develop Educational Team Leaders, IEP Chairs and other non-administrative leaders across the Commonwealth. We now have three cohorts and much positive feedback and evaluation data.
- Also as described in the August report, CES completed a second cohort round of train-the-trainers in the **LEAP (Low-Income Education Access Project)**
- We continue to offer a MA Focus Academy course entitled **Collaborative Co-Teaching in the Inclusive Classroom**.

In **Licensure** news:

- Our Fall semester is off to a great start! Both Teacher and Administrative Leadership courses have begun in Northampton and Marlborough. We are offering 10 Teacher courses and 2 Administrative Leadership courses this semester, and both are off to great starts. This includes two no-cost courses funded by Massachusetts ESE that are designed to help teachers who are currently teaching Moderate Disabilities under a waiver show progress towards an Initial License.
- The CES Licensure Program more than doubled enrollments between FY16 and FY17. Fall 2017 course registrations have increased by more than 20% over Fall 2016.
- Our first Administrative Leadership cohort is beginning their Educational Leadership and Management seminar, the practicum portion of their program. We are excited to have this cohort of future educational leaders completing their program with us.

**ADDITIONAL SELECTED HIGHLIGHTS**

**Development - New Grants / Funding Applications August 25, 2017 - September 22, 2017**

- The Franklin Hampshire Regional Employment Board submitted a STEM-Focused Internship Grant Application to MA DESE and included CES’ Matt Rigney as Program Manager. The award decision is pending.
● Submitted Early Literacy: Integrating Positive Behavior Supports into Daily Routines and Activities to MA EEC for the CES EC Dept. Requested $50,000 for one year. Award decision pending.

● Submitted Inclusive Tier 1 Instruction Academy to MA DESE for the CES PD Department. Requested $1.4 million total, or $350,000 annually for four years. Award decision pending.

● Submitted Quality Enhancements in After school and Out-of-School Time (ASOST-Q) to MA DESE for Maple School in Easthampton, Converse Middle School in Palmer, and Coburn School in West Springfield. Requested $20,000 for one year. Award decision pending.

● Submitted Inclusive Preschool Teams to MA EEC for CES EC Dept. Requested $50,000 for one year. Award decision pending.

● Submitted 21st Century Community Learning Centers Program Continuation grant. Requested $710,845 for one year for: Maple and Pepin Schools in Easthampton, Converse Middle School in Palmer, Coburn School in West Springfield, Easthampton High School, Greenfield High School, Memorial School in West Springfield, Sheffield School in Turners Falls. Award decision pending.

Research and Evaluation
Research and Evaluation department staff are supporting public schools, other partners, and CES with several program evaluation projects. Current or recent projects include:

● Implementation study of heterogeneous math classrooms in secondary school for a member district.

● Longitudinal study of afterschool programs in 9 elementary schools, looking at participation, program quality, and student outcomes, utilizing student outcome data from the after school program and the public schools. Study includes afterschool programs in both of our counties.

● Program evaluation of five-year NSF-funded intervention targeting traditionally underrepresented groups in engineering—especially girls—using a multi-media, “imaginative education” approach in formal and informal education settings.

● Assessment of educator perceptions of and follow-up from social justice and equity supports provided to K-12 staff in the Pioneer Valley.

● Technical assistance to support the development of a district equity assessment that engages multiple stakeholder groups and yields actionable findings for school personnel and community partners.

Business Development / Communications

• We’re pleased with the progress of the Proud of WMass Schools social media initiative. Posts continue to go up on the Facebook page, which has gathered close to 400 followers Among the schools featured in posts to date have been those from 8 different districts in Hampshire County, 8 different districts in Franklin County, and 4 Berkshire County districts. We are always seeking more content, and now that the school year has begun, we’re finding some wonderful photos, events, and programs to talk about! We encourage Board members to “like” the page and recommend stories from their districts to include! https://www.facebook.com/wmasspublicschools/
• The Business Development team has begun outreach for our fall 2017 professional development offerings for both K-12 educators and early childhood providers.

• The team is beginning work to create new branding and outreach material to support both our Occupational Therapy Center and Center for Assistive Technology; as part of the 2017/18 business plan on behalf of both centers. In addition, work has begun to implement the comprehensive market research plan developed over the summer to support these two Centers and their proposed new service lines. This work will continue through September and October.

• Work on the FY17 Annual Highlights Report has begun. This report is generally distributed at the beginning of each calendar year.

I hope you find this selection of recent activities informative and helpful. Please feel free to call me if you have any questions or want further information about the activities outlined in this report.

Best regards,

[Signature]
END OF SUMMER
EXECUTIVE DIRECTOR
REPORT TO THE BOARD OF DIRECTORS

August 30, 2017
Dear Members of the Collaborative for Educational Services Board:

I hope all of you have been enjoying a wonderful summer. It’s been busy at CES and, since it’s a long stretch between our June 28, 2017 meeting and the first meeting of the new school year (September 27), I’m sending an interim report on some of the summer highlights.

**Highlights from the Executive Director**

In June, I provided the Board with an update on two major areas of transition. These changes have been in the planning and preparation stages for over a year and are designed to prepare CES to grow and better serve our districts, schools, educators, families, students, and partners. The changes will also allow us to be more effective, efficient, collaborative, inclusive, and sustainable with a diverse and empowered staff. I am very pleased to report that we successfully launched most of these major changes over this summer (with some actions to be undertaken in the fall). Among the **technology successes**:

- After weeks of intensive work by and training of the Business and Human Resources staff and others, we successfully launched key parts of our new financial system – **Infinite Visions**.
- Our customer relations management system, **Salesforce**, has largely been implemented across the agency and we are seeing many benefits already in improving our responsiveness to our member districts, schools, educators and other users of our services.
- We implemented an **Applicant Tracking** system for our new positions as a tool in streamlining our recruitment, screening, interviewing, selection, and on-boarding processes.

**Restructuring developments** this summer include:

- Formation of a **nine member Cabinet** to work regularly with the Executive Director on leadership and management in the agency.
- Appointment of a **new Deputy Director**. Terry Senio will begin September 1. She is currently the SEIS Contract Administrator and brings a wealth of experience and knowledge to her new position.
- Assumption of **new leadership roles** by Barbara Siegel (Director of Finance and Operations), Kathy Levesque (Director of Business Development and External Relationships), and Angela Burke (Director of Professional Services).
- **Beginning the re-organization** of departments, functions, and staff into these broader areas of work.

In the area of **advocacy** for CES and our member districts, I continued to meet with key state partners at ESE, EEC, CommCorp and DYS to further develop relationships and to explore new areas of work. **This will be especially important going into the fall** – Christine Kenney, the Director of Education for DYS and our long-time colleague and advocate, will be leaving for Nevada soon; CommCorp has just hired a new President; and ESE has a new Acting Commissioner. I also met this summer with **local legislators Senator Humason and Representative Scibak** and with **Mike Knapik (Director of the Governor’s Office in Western MA)** to discuss the work of the Collaborative and common concerns among our member districts. I also went into Boston and met...
with Representative Alice Peisch and the education aide to Senator Sonia Chang-Diaz. (Rep. Peisch and Senator Chang-Diaz are Co-Chairs of the Joint Committee on Education.)

In addition to our Summer Academy and other workshops, we held two major professional development institutes this summer. The first was for our train-the-trainer intensive in Leading Educational Access Project (LEAP). As ESE notes on their website – “LEAP trainers” (whom CES trained) “now represent fifteen educational collaboratives and have been provided with instructional knowledge and materials to support school districts in their efforts to develop sustainable systems and practices to support all students, and especially our most vulnerable students – inclusive of low-income students, ELL students, students of color, and students with disabilities.” The summer marked the second year of the project with 4 days in the summer. This is done through a contract with ESE – and they have been very pleased with this work! The LEAP trainings were highlighted as the top story in the Aug 4 Letter from the acting Commissioner. It's terrific to see this excellent work recognized and highlighted by ESE.

The other major PD institute that kicked off a second year this summer was the Special Education Team Leader Institute (SETLI). Done in partnership with and funded by the ESE, SETLI is designed to equip special educational team leaders with tools to foster family and community engagement and improve student outcomes by facilitating team meetings that are collaborative and compliant with regulations and best practices in the field. Last year was the first, with 60 participants. It was so successful that ESE funded us to have TWO cohorts for 2017-18. As one participant wrote after completing the 4-day intensive this summer: “Thank you so much for "jazzing" me up this week (just channeling my mom when I chose to use that word)!! I am having tons of fun and adding so much to my bag of tricks. It's so exciting to me that this will continue throughout the year. So often we take wonderful workshops that spark us for a few weeks and then the excitement dies off. Because this adventure will continue throughout the year, I am certain that my flame will stay lit for a long time.”

During the summer, CES, with the leadership of Safire DeJong and with support from Angela Burke and several other CES staff members, completed work in providing critical analysis and recommendations to Easthampton Public Schools to help formulate a plan to address racism and other forms of oppression at EHS and EPS. Safire led 14 focus groups that included over 200 participants, had multiple discussions, and analyzed 287 surveys to arrive at the recommendations. As the CES report to EPS notes: “EHS and the entire district has a powerful opportunity to demonstrate how a school and community can heal and transform an environment that has been experienced as hostile and uncomfortable by many students, teachers, and community members.” Using CES’s report and recommendations, investigations by the Superintendent, and a report from the Attorney General’s office, EPS has developed a ten-point plan to pro-actively address the issues in multiple ways.

I look forward to a productive year ahead! See you at the September meeting.

Respectfully submitted,

Bill Diehl

Following this letter are additional highlights.
STRATEGIC GOAL 1: MEETING MEMBER DISTRICT NEEDS by collaborating to build needed strength and capacity based upon recognition of current and upcoming demands and trends in education.

SELECTED / REPRESENTATIVE ACTIVITIES

- 13 courses were offered during our Franklin/Hampshire Summer Academy ranging in topics from English Language Learners, Technology in the Classroom, History, Special Education and Social Emotional Learning.

- A number of PD opportunities which involved educators from member (and other) districts were offered as part of our Teaching Primary Sources grant.

- Fall Open enrollment is live and available for registration. (The Fall Catalogue, with many timely offerings for educators, can be found here: https://www.collaborative.org/sites/default/files/Spring%202017%20PD%20Catalog%208.15.17.pdf)

- Cecelia Buckley retired as Director of the CES Licensure Program. Suzanne Judson-Whitehouse is the current Director of Educator Licensure and Credentialing. We also welcome Allison Church back to Licensure as our Technical Support Coordinator.

- Albert Mussad, with Professional Services, has been trained to support districts in “Planning for Success,” which is based on the Massachusetts Planning and Implementation Framework from ESE. The Amherst Regional School District is contracting with CES to facilitate the initial phases of this strategic planning. More information about Planning for Success in Massachusetts is available at http://www.doe.mass.edu/research/success/.

- We are completing the application for funding for the Perkins Consortium that includes South Hadley, Easthampton, and Amherst. The grant provides funding and materials support to these districts as well as professional development for educators who are running Perkins programs. In addition, we are pursuing a grant from the MA STEM Council that will enable us to develop employer-paid STEM internships for youth in Hampshire and Franklin Counties.

- Our Healthy Families and Community / SPIFFY department was busy over the last two months
  - SPIFFY partnered with the Northwestern District Attorney’s office and Hampshire HOPE to screen the film RESILIENCE at our local theater. The screening was followed by a panel of experts in the field of Trauma Informed Practices. Over 200 people attended and expressed enthusiasm for continuing to discuss how our communities can address early trauma and the resulting negative health outcomes, including addiction.
  - SPIFFY was awarded funding from the MA Attorney General’s Office to support implementation of Life Skills in our schools. In addition to hosting Life Skills curriculum trainings, we are also starting to plan a Professional Learning Community (PLC) series for school staff. The PLC’s are monthly throughout the school year and offer networking and information on implementing LifeSkills and other school-based prevention strategies. We have trained teachers in four of...
our partner municipalities, and anticipate implementing Life Skills in those middle schools this coming school year.

- SPIFFY co-sponsored 2 Youth Leadership Initiative Summits in the late spring with 22 individual youth and 11 different youth groups from the region. Youth learned about risk and protective factors, talked extensively about what it means to be a leader, had youth presenters share their stories, and were able to make connections with other youth from across Franklin and Hampshire counties and do some asset mapping. After implementing the 3rd and final Summit for this year, we met (CTC, SPIFFY, and Community Action! Youth Programs) to reflect and plan for next year. All of these efforts are working toward the goal of connecting youth both to each other and the coalitions working to support them. We want to elevate the voices of young people and create a network they can use to mobilize and speak out at public hearings and at coalition meetings in their area.

**STRATEGIC GOAL 2: FOSTERING THE SUCCESS OF CHILDREN, YOUTH AND FAMILIES, WITH A FOCUS ON THOSE PLACED AT RISK** – by providing educational programs, policies and practices that foster the success of families, youth and children.

**SELECTED / REPRESENTATIVE ACTIVITIES – SPECIAL EDUCATION**

Overall, we had a very successful summer with our programs; many Academy students expressed verbally that they feel they are making progress b/c of our school, and how important being here is to them.

- Mt. Tom:
  - Intensive training over the summer in the Summit personalized learning platform
  - Current projections for fall are 6, possibly 7 students.
  - Mt. Tom staff joined the Special Ed. Department’s annual orientation for the first time this year

- HEC Academy
  - Very successful and low-key summer; served 25 students total
  - One student joined us just for the summer (Northampton) to earn final credit toward his diploma
  - One of our students secured an internship w/ Community Legal Aid with support from staff; she participated in a resume-writing and an interview process, and she starts this fall
  - Ashley Cole, the CES Nurse, received her DESE school nurse license in June--congratulations to Ashley!
  - We are currently gearing up for our school year:
    - Orientation for Special Education staff began on Monday, August 28th.
    - Students will return to school on Tuesday, September 5; we are expecting 30 - 32 students
  - Facilities:
    - A new 7D van has just been purchased from Marcotte Ford; it’s a 10 passenger Transit van that will be delivered around September 1
    - New carpet is being installed in one of our homeroom main spaces

- Collaborative Center for Assistive Technology and Training (CCATT),
○ The CCATT team was awarded the DESE grant for a year long institute: Assistive Technology: From Access to Success in the Classroom (see below under Goal 3)

○ On September 28, Jeanne Tuthill, Erin Travis, and Sherry Smith will be providing a 3 hour workshop to DESE staff in Malden regarding Assistive Technology

○ We’ve had summit meetings during the summer with both the Collaborative Center for Assistive Technology and Training (CCATT), and our Occupational Therapy Center (OTC), part of the initiative to provide consultative and business planning support for these groups as they review and design their evolving service lines. This is an effort that began with advisory groups from our own Board of Directors providing valuable input and direction, and plans are to provide updates and proposed business plans for both Centers at our September Board meeting. Marketing is currently completing market research plans for each Center and will begin implementing that research over the coming weeks.

SELECTED / REPRESENTATIVE ACTIVITIES – Early Childhood

Coordinated Family and Community Engagement (CFCE)

Our family centers and playgroups across our 17 CFCE towns and communities provided summer programming that included several outdoor activities in local parks and water play! Some of our highlights are:

- **South Hadley** had a very successful summer concert series
- **Belchertown** Family Center began programming of their new space. The GRAND opening for the new space is September 30th.
- **Our Spanish Programming team** is progressing well on several FY18 community partner collaborations to enhance our programming in **Amherst** and the surrounding community.
- **Ware** is holding their second annual Ware Jr. Car Show on September 9th.
- **Hampshire Regional** is hosting story walks and puppet shows, and STEM water fun activities
- We are planning the Puzzle of Parenting calendars and CFCE Council meetings across the 17 CFCE sites.

Assessment for Responsive Teaching (ART)

- In June and July 2017 the Assessment for Responsive Teaching project increased its capacity to **serve early educators whose primary language is non-English**. Our foundational observation course, Using Observation Skills for Planning and Assessment, is now available in Chinese, Haitian Creole, Spanish, Portuguese, and English. Engaging Families in the Assessment Process is now available in Chinese, Spanish, Portuguese, and English. Assessing Diverse Learners is now available in Spanish, Portuguese and English.

- We are pleased to welcome two new trainers to our team who are fluent in English, Spanish, and Portuguese and are searching for trainers in Chinese and Haitian Creole

- This summer we also created and sent a survey to participants who requested electronic portfolios in Teaching Strategies GOLD to see what kinds of follow-up support might be needed beyond the initial training experience

- Two trainings in Understanding and Implementing Developmental Screening were held at the end of August.
• The FY18 contract was **recently renewed** for this project.

**Early Childhood Professional Development**

• Our Early Educators Calendar & PLC planning is in its final stages. Upcoming topics include: Understanding and Addressing Young Children’s Behaviors, Introducing Social Justice and Diversity to Young Children, Sensory Motor Development in Young Children, Social Emotional Learning and Approaching to Play and Learning Standards Online course, STEM: Creativity Imagination and Big Ideas, Having Difficult Conversations with Parents, and Promoting Brain Building

**Early Childhood Mental Health (ECMH)**

• This summer was busy and one of the needs we have been providing resources and support on concerns children in transition: to kindergarten, family moving or changing classrooms.
• Cases currently open: 14 children and families and 2 classrooms
  - Cases closed (June and July): 4
  - Expulsions prevented: 4
  - Programs currently being served: 10

**SFYC**

• Exploration continues on a possible narrowing of eligibility requirements to help focus programming on families with no access to other ECMH services and in expanding these services to all of Hampshire County instead of limiting it to only Easthampton and Ware.

**Family Child Care (FCC) Parent Child Home Program (PCHP)**

• This program provides services to family child care providers in our 17 CFCE towns/communities service area. Summer activities include recruiting 6 family child care programs and services will begin in early October.

**SELECTED ACTIVITIES – Special Education in Institutional Settings**

• The concluding 2017 SEIS contract performance measure report was submitted on time and approved by ESE. The SEIS contract **has been extended until the new RFR is posted in 2020.**

• Lots of time has been invested in planning for and vetting the professional development plans for the 2017-2018 school year. The Google slide training provided by Casey Daigle and Lauren Parent has been extremely helpful in getting all this work completed.

• During the summer months, two SEIS/DYS teachers joined the DYS facilitator training and have been planning with DYS counterparts to prepare 2017-2018 professional development for teachers. These SEIS teachers will model inclusive practices addressing special education requirements, using the IEP when planning, and addressing student IEP goals across the curriculum. Four of our SEIS DMH teachers met to create the first curriculum map for the Future Ready class that will be piloted this fall in our Worcester programs.

• SEIS Leadership from CES and ESE joined up on July 18 for a retreat that focused on contract requirement, role clarity and communication. The retreat was facilitated by Therese Ross. It was a very productive and enlightening day. This work will continue for
five leadership development sessions throughout the 2017-2018 school year.

**SELECTED ACTIVITIES - Department of Youth Services Education Initiative**

- The new Math and Science Instructional Guides have been finished, published, and faculty will be introduced to the new guides through statewide Professional Development. The Guides will also be posted on the CES main website, and we’ll notify districts of their availability there for interested teachers once they are up.

- Enchanted Circle Children’s Theatre Company and CES partnered to submit a grant to the NEA to provide a year long residency at two programs called “Speak up, Speak out” focusing on development of identity, spoken word, and transformation.

- 11 employees, including teaching coordinators, IT staff, management, and instructional coaches attended a blended learning boot camp focused on use of the Google Apps for Education and Chromebooks to strengthen teaching and learning. Three Massachusetts / CES employees who have participated in the GAFE bootcamps in the past were selected as part of a rigorous selection process to serve as Ambassadors for other juvenile justice jurisdictions across the nation. We are proud of their leadership, initiative, and proficiency in combining technology with higher order learning experiences.

- 6 weeks of summer school ended on August 18th

- 150 Chromebooks have been readied for deployment to our TX programs throughout the state as part of our 1:1 Limitless Learning initiative.

- A partnership with Boston Public Library to provide e-Readers to youth in the Boston region has been solidified and will expand the range of reading materials we have available. We are excited about this opportunity and the potential it holds.

- During the 2016/2017 academic year, the interests of approximately 65 youth in residential care with a HS credential were identified, including approximately 15 detained youth, in 27 different programs in all 5 regions. Based on interests identified and on young people’s education and career goals, dozens of certificate bearing and exploration based course opportunities were researched. Youth were enrolled in or offered exposure to opportunities including Accuplacer preparation, OSHA, VetTech, ServSafe, Kamir, CAD, Culinary Math, Intro to Psychology, Intro to Criminal Justice, Intro to Starting Your Own Business, Programming C#, Personal Training, and other certificate and exploration based courses. Numerous youth received OSHA and ServSafe certifications and certificates of completion for Ed2go adult learning courses. Three youth received personal training certifications. One youth received Vet Tech certification. A program-based Future Ready Maintenance and Facilities work experience opportunity for a cohort of 3 detained youth was implemented.

- College Now Pilot: Two regions participated in a nation-wide College Now Pilot facilitated by the Center for Educational Excellence in Alternative Settings (CEEAS). The two sites have become approved CLEP test centers and a classroom has been set up at each site for the pilot. Ten students were enrolled in live virtual CLEP preparation courses. College Now is intended to offer the students a college like experience and prepares students to take a CLEP exam and earn college credit. Five students have taken two College Now courses and two CLEP exams. Five students have taken one College Now course and one CLEP exam. Based on the success of the program, we will expand to 2 more regions this school year.
STRATEGIC GOAL 3: DEVELOPING EXEMPLARY EDUCATORS - through the delivery of high-quality and distinctive professional development.

SELECTED/REPRESENTATIVE ACTIVITIES
(SEE ALSO GOAL 1)

- CES is pleased to be offering two ESE funded special education institutes this school year: Assistive Technology: From Access to Success in the Classroom, and Understanding and Teaching Students in Poverty. Online registration is underway for both Institutes. Both represent areas of expanding services and professional development for CES.

- Plans are underway for the design of two important spring events, the CES Technology in Education (TiE) Conference in January, and our next Transforming Education for Social Justice Conference, which is planned for March. We hope to be able to share details soon about these important events.

- Coming up sooner this fall, we will be offering three workshops on social justice matters. We are also announcing the launch of our Educational Equity Through Blended and Personalized Learning Institute, which will begin in October with the initial course for administrators. Based on the Friday Institute approach, the course seeks to help create equity-based, inclusive schools, reducing opportunity gaps through personalized learning. For administrators seeking to understand the role that personalized and blended learning can play in moving forward to a more tailored approach to learning, this will provide a great foundation.

- In addition to SETLI (Special Education Team Leaders Institute) which is described in the beginning of this report, we also held HETLI (Holyoke Special Education Team Leaders Institute) which took place 8/22-26. This is a special version of the SETLI designed specifically for the Holyoke Public schools, and came about because of the success and reputation of SETLI.

- The Licensure Program completed the Summer Semester with 9 Teacher Licensure courses and 2 Administrative Leadership courses. Fall Licensure courses begin on September 13th.

- CES will be providing a 45-hour year-long content institute on the topics of assistive technology, accessible instructional materials, and universal design. This institute is sponsored by the ESE and is designed to help school and district personnel take advantage of technologies and resources that will enable all students, especially those with disabilities, to access the curriculum and to enhance their learning. Participants will be introduced to the SETT Framework which is the framework our specialists use when considering what a student needs in terms of AT; they will be provided with cursory information about tools available for a wide variety of AT needs; and, barriers to access and implementation will be briefly discussed.
OTHER AREAS – A FEW HIGHLIGHTS

Business Development and External Relations

- The restructured Business Development team began on July 1st, bringing together our development functions and our marketing and communications team. We’ve been meeting with department heads and contacts over the summer months to explore plans and priorities for the FY18 year, and working on our plan priorities for the year.

- Training and development work has continued this summer to lay the groundwork for further releases of our Salesforce CRM. Work has already begun to roll out our grants and development documentation in the system, and will soon commence to wrap up some final functions that will support our licensure group, enabling them to make the transition into Salesforce from our legacy Filemaker program. As we enter the school year, we plan to begin training and rolling out documentation of contracts as well.

- We are pleased to welcome a talented new team member, Crystal Colon, as our Development Specialist. Crystal will be supporting Isolda Ortega-Bustamante, our Director of Development. Crystal jumped right in this summer and has trained on multiple government grants databases as well as our own Salesforce system. She documented our grants and development work in Salesforce already, and has been instrumental in supporting the team during summer vacations.

- Two Business Development team members have taken offsite training in Project Management skills and will be sharing learning from that experience with the rest of our team.

- CES Marketing and Communications was selected in mid July as the vendor for an 8 month contract for marketing consulting services with ACCEPT Collaborative in Natick. The project is funded by the Sudbury Foundation, and will provide a variety of assessment, messaging and design, and planning and strategic recommendations to our sister collaborative.

- Marketing began in late July for our fall Licensure courses, and for our two Mass Licensure Academy course (these are free, funded by ESE for teachers working toward their moderate disabilities license)

Development

- The Coordinated Family and Community Engagement Grant application to the Dept. of Early Education and Care for FY18 was awarded $502,563.00 to serve the communities of Amherst, Belchertown, Chesterfield, Easthampton, Goshen, Granby, Hatfield, Monson, Palmer, Pelham, South Hadley, Southampton, Ware, Warren, West Brookfield, Westhampton, and Williamsburg.

- The application to MA DESE for the Afterschool Program under the 21st Century Community Learning Centers - Exemplary Programs Grant was awarded $150,000 to serve the West Springfield High School.

- The application to MA DESE for the Afterschool Program under the 21st Century Community Learning Centers - Supporting Additional Learning Time Grant was awarded $150,000 for FY18 to serve the Amherst Regional Middle School VELA Program.
• Awarded $2,000 by MA DESE for an additional Institute by the Collaborative Center for Assistive Technology and Training (CCATT).

• Awarded bid by MA DESE for the Berkshires+ District and School Assistance Center Literacy Support services. (Berkshires + includes several Hampshire County districts) Requested $150,000. Exact amount of award to be determined.

• Submitted a response to a bid by MA DESE for an evaluator for the New Skills for Youth program. Requested $120,000 for three years. Award decision pending.

• Submitted an application to the Barr Foundation for Turners Falls High School (GMRS&D) for school-wide high school reform planning with several partners. Requested $300,000. Additional information requested as part of new round of funding consideration. Award decision pending.

• Submitted a grant proposal titled Accessing American History and Civics for Struggling Learners to the US DOE under the American History and Civics-National Activities Grants. Requested $964,700 for three years. Award decision pending.

Human Resources

• We continue our training of Hiring Managers on Applicant Tracking in order to help them use this tool in new and helpful ways in order to support more efficient hiring practices.

• Planning for the upcoming year’s orientations is well under way. We’ll once again be conducting some of our orientations virtually via zoom - for returning DYS/SEIS staff. This year’s new teacher orientation for DYS and SEIS staff will be held in Northampton.

• We are also reviewing our employee handbook to see if there are any changes which need to be made in response to some of the practices which we will be employing as part of our new financial and HR system (Infinite Visions).

• Safire Dejong has begun working with our department in order to more fully integrate our SJE Initiative into the CES culture. We hope to provide CES employees with more support around SJE-related issues/challenges and offer them additional training/learning opportunities.

• We met with the Employers Association of the Northeast (EANE) earlier this summer and will be pursuing a grant which will fund Leadership Development Trainings for staff. EANE also offers up to 10 free trainings for staff members. The grant will allow us to train even more CES staff - one program which we hope to offer more broadly is “Principles of Leadership for Supervisors and Managers”.

Business Office

• July 1st we went live with our new software, Infinite Visions, for Finance & Human Resources. Special Kudos to the entire staff of both departments, with a special nod to Rebecca Lincoln, our Assistant Director of Finance and David Olsson, our Data Engineer.
• We had our annual monitoring of the DYS contracts conducted by Commonwealth Corporation. The reports came back with no findings.

• All our applications for our insurance products have been submitted and approved.

• Training of new Grants Manager, Kim Wolcott, is underway. Kim provided support to Grants Management for several years prior to her most recent position as Accounts Receivable Analyst.

• Continued our work with the OTC & CCATT Business Plans for FY18. Sarah Bates will be submitting a progress report to the board for the September meeting.

I hope you find this selection of summer activities informative and helpful. I look forward to seeing you at our first Board meeting of the new school year, on September 27, 2017.

Please feel free to call me if you have any questions or want further information about the activities outlined in this report.

Best regards,

August 30, 2017