



AGENDA and NOTICE SCHOOL COMMITTEE MEETING

This is a remote meeting with public comment available via the meeting link.

Regular Session Meeting
Monday, July 6, 2026

LOCATION

40 Fairbank Road, Sudbury, MA 01776; Room 214
Dial In: 1 301 715 8592 - Webinar ID: 847 7970 1186
Live Link: <https://us02web.zoom.us/j/84779701186>

AGENDA

6:30 p.m. - Open Executive Session

(Approximate)

1. Executive Session
 - a. a. Motion and vote to meet in executive session and to return to open session pursuant to Massachusetts General Laws chapter 30A section 21(a)(3) for the following purpose:
 - i. Purpose (7) to comply with, or act under the authority of, any general or special law or federal grand-in-aid requirements, specifically, the Open Meeting Law, GL c30A, §§22 (f), (g), relative to the School Committee's executive sessions for the following dates: February 5, 2026, February 9, 2026, March 2, 2026 and March 13, 2026.

7:00 p.m. - Open Regular Session

(Approximate)

2. Public Comment 15 Mins
 - a. At the start of each regularly scheduled School Committee meeting, community members may address the Committee. In-person attendees should sign in; remote attendees on Zoom should use the "Raise Hand" feature (in the Reactions menu, or under "More" on mobile). For remote comments, attendees must also type their full name into the Zoom name field in order to be called on. Per Policy BEDH, each speaker has up to three (3) minutes and must state their name and city/town. Public comment is not a discussion or debate, but an opportunity to share opinions on matters within the Committee's authority. Meetings are live-streamed and recorded for SudburyTV; participation constitutes consent to be recorded and broadcast.
3. Opening Statement from Chair and Budget Subcommittee Chair (Reports) 5 Mins
4. Educational and Operational Matters (Reports) 10 Mins
 - a. District Reports
 - i. Interim Assistant Superintendent
 - ii. Interim Superintendent
5. Consent Calendar (Discussion/Action) 5 Mins
 - a. Approval of Minutes (05/18/26 and 06/01/26)
 - b. Monthly Accounts Payable and Payroll Warrants Submission
6. Business and Policy Matters (Discussion/Action) 15 Mins
 - a. Combined Facilities Director (Discussion/Action) 15 Mins
 - i. Haynes and Nixon Roof Projects Update
 - ii. Solar Panels Update
 - iii. Cafeteria Tables
 - iv. Fire Alarms
 - b. Superintendent Search Process (Discussion/Action) 40 Mins

- | | | |
|--|---------------------|------------|
| c. Budget Tiered Initiatives Overview | (Discussion) | 10 Mins |
| d. Discussion on holding community Listening Session on Jewish student experiences, religious inclusion and belonging across Faith Communities | (Discussion/Action) | 15 Mins |
| e. Transportation RFP update | (Discussion/Action) | 5 Mins |
|
7. Future Agenda Items |
(Report) |
5 Mins |
| 8. Adjournment | | |

This listing of matters is those reasonably anticipated by the Chair, which may be discussed at the meeting. Not all items listed may in fact be discussed, and other items not listed may also be brought up for discussion to the extent permitted by law. The Chair will strive to honor timed items as best as possible.

*The next School Committee Meeting is scheduled for **Monday, July 20, 2026***

**Sudbury Public Schools
School Committee Meeting**

Date: July 6, 2026

Agenda Item: 5 - Consent Calendar
a. Approval of Minutes (05/18/26 and 06/01/26)
b. Monthly Accounts Payable and Payroll Warrants
Submission

Recommendation:

Motion to approve the consent calendar as presented/amended

Background / Preparation Information:

- a. **Approval of Minutes** - These minutes need to be approved to be added to our website. Please review for accuracy and bring any changes.
- b. **Monthly Accounts Payable and Payroll Warrants Submission** - These documents need to be approved by the full Committee. Please review these documents and bring any questions to the meeting.

Attachments:

051826_Sudbury School Committee Minutes_DRAFT
060126_Sudbury School Committee Minutes_DRAFT
SC Meeting Warrant Summary - 061526

Action: XX **Report:** **Discussion:** XX

Sudbury School Committee
Meeting Minutes - DRAFT
May 18, 2026

Members Present:

Karyn Jones, Chair
Jessica McCready, Vice Chair
Julie Durgin-Sicree
Ellen Lederer-DeFrancesco
Betsy Sues

Also Present:

Brad Crozier, Superintendent
Annette Doyle, Assistant Superintendent
Don Sawyer, Director of Business and Human Resources
Michelle Marino, SEA Representative
Karen Wolfson, Math Curriculum Coordinator

Open Executive Session

Chair Karyn Jones opened the meeting. Jessica McCready, Betsy Sues, Julie Durgin-Sicree and Karyn Jones all confirmed their presence.

1. Executive Session

- a. Motion and vote to meet in executive session and return to open session pursuant to Massachusetts General Laws chapter 30A section 21(a) for the following purposes:
 - i. Purpose (1) to discuss complaints brought against a public officer, employee, or staff member or individual (OML Complaint - M. Warzynski, 05/13/2026)
 - ii. Purpose (7) to review and approve minutes from the Sudbury School Committee Negotiations Subcommittee executive session of May 1, 2025
 - iii. Purpose (7) to review and approve minutes from the Sudbury School Committee executive session meetings of May 18, 2026
 - i. Vice Chair Jessica McCready made a motion and vote to meet in executive session and return to open session pursuant to Massachusetts General Laws chapter 30A section 21(a) for the following purposes. Purpose 1 to discuss complaints brought against a public officer, employee, or staff member or individual (OML Complaint - M. Warzynski, 05/13/2026), purpose 7 to review and approve minutes from the Sudbury School Committee Negotiations Subcommittee executive session of May 1, 2025 and purpose 7 to review and approve minutes from the Sudbury School Committee executive session meetings of May 18, 2026. Betsy Sues seconded the motion.
 1. ROLL CALL VOTE:
 - a. Julie Durgin-Sicree: Aye
 - b. Betsy Sues: Aye
 - c. Jessica McCready: Aye

- d. Karyn Jones: Aye
 - i. **Vote: 4-0.** Motion carries.
- ii. Vice Chair Jessica McCreedy confirmed the Committee will enter into executive session and return to open session pursuant to Massachusetts General Laws chapter 30A section 21(a) for the following purposes. Purpose 1 to discuss complaints brought against a public officer, employee, or staff member or individual (OML Complaint - M. Warzynski, 05/13/2026), purpose 7 to review and approve minutes from the Sudbury School Committee Negotiations Subcommittee executive session of May 1, 2025 and purpose 7 to review and approve minutes from the Sudbury School Committee executive session meetings of May 18, 2026.

Open Regular Session

Chair Karyn Jones opened the regular session meeting at 7:06 p.m.

- 1. Public Comment
 - a. Noah Stern Weber, Sudbury resident, shared his concern that the student connectedness survey does not provide the data to capture the experiences of Jewish students, referenced statewide hate crime and bias statistics, and stated his intent, as a member of the Anti-Hate Task Force, to advocate for the establishment of a Jewish Parent Advisory Council (PAC) as a Task Force recommendation.
 - b. Julie Durgin-Sicree, Sudbury resident, spoke on her behalf as a private citizen and emphasized the need to rebuild trust through transparency, respectful communication, and collaboration following the vote of no confidence. She encouraged the School Committee to move forward as a unified team, engage in thoughtful deliberation, and restore public confidence through accountability and consistent leadership.
 - c. Vice Chair Jessica McCreedy shared a statement welcoming Annette Doyle as Interim Superintendent for the 2026–2027 school year. She also thanked Brad Crozier for his leadership, years of service and commitment to ensuring a smooth transition.
- 2. Educational and Operational Matters
 - a. SEA Report (Michelle Marino)
 - i. Ms. Marino shared an end-of-year reflection on the 2025–2026 school year, noting that staff were balancing curriculum delivery, student support, evaluations, planning for next year, and community events as the year comes to a close. She shared both the challenges teachers faced and also positive experiences. The SEA looks forward to continued collaboration in the year ahead.
 - b. District Reports
 - i. Director of Business and Human Resources
 - 1. Bus registration is underway with 714 students registered to date. A survey is being used to gather feedback about a.m. and p.m. stops.
 - ii. Assistant Superintendent
 - 1. Third and fifth graders at Noyes Elementary received a Youth Service Award for preparing meal kits for the Sudbury Food Pantry.

2. A reminder that 8th Grade Capstone civic action projects will be presented on Wednesday, showcasing student-led research and community-focused action projects.
- iii. Superintendent
 1. Recent student events include participation in the Special Olympics in Littleton, Kindergarten Orientation is scheduled for June 3rd, and 8th graders just returning from their Washington DC trip. Thanks to the staff and volunteers who helped to support the experience for the students.
 2. He also highlighted the 8th Grade Capstone projects and commended students for their engagement and learning through these projects.
3. Consent Calendar
 - a. Approval of Minutes (03/02/2026; 03/16/2026; 03/31/2026)
 - b. Approval of Subcommittee Minutes
 - i. Tri-District Calendar Review Subcommittee (02/27/2026)
 - ii. Budget Subcommittee Minutes (04/30/2026)
 - c. Approval of Monthly Accounts Payable and Payroll Warrants
 - d. Receipt of CASE Collaborative's Q3 Report
 - e. Receipt of ACCEPT Educational Collaborative's Q3 Report
 - f. Approval of Anti Hate / Anti Bias Task Force Charge
 - g. Approval of the Triennial Review and Proposed Local Wellness Policy Revisions
 - h. Receipt of the Superintendent's Implementation Guide for Policy IMDA
 - i. Vice Chair McCready provided an update on the Wellness Policy revisions.
 - ii. Questions were asked regarding the distribution of Policy IMDA and the ACCEPT Collaborative Q3 report, including transportation and financial concerns.
 1. Vice Chair Jessica McCready motioned to accept all items on the Consent Calendar. Julie Durgin-Sicree seconded the motion.
 - a. ROLL CALL VOTE:
 - i. Julie Durgin-Sicree: Aye
 - ii. Ellen Lederer-DeFrancesco: Aye
 - iii. Betsy Sues: Aye
 - iv. Jessica McCready: Aye
 - v. Karyn Jones: Aye
1. **Vote: 5-0.** Motion carries.
4. Business and Policy Matters
 - a. Welcome Member Ellen Lederer-DeFrancesco; Review of School Committee Operating Protocols, Policy BA-1
 - i. Chair Jones welcomed new Committee member, Ellen Lederer-DeFrancesco
 1. Vice Chair Jessica McCready motioned that the Sudbury School Committee reaffirm its commitment to the School Committee Operating Protocols as outlined and that all members agree to conduct the work of the Committee in accordance with these established expectations. Betsy Sues seconded the motion.
 - a. ROLL CALL VOTE:
 - i. Ellen Lederer-DeFrancesco: Aye

- ii. Julie Durgin-Sicree: Aye
 - iii. Betsy Sues: Aye
 - iv. Jessica McCready: Aye
 - v. Karyn Jones: Aye
1. **Vote: 5-0.** Motion carries.

b. Discussion Regarding Operational Feedback from Union

- i. In response to topics brought up during Negotiations, the purpose of this agenda item is to discuss governance and oversight responsibilities related to appropriate staffing levels, allocation of resources, workload and caseload management.
- ii. Concerns related to feedback shared and a request to bring to executive session was asked.
- iii. An appreciation of the timeliness of this agenda item related to goal setting and alignment was shared.
- iv. A request for presentations sharing data on staffing and resources was made.

c. 2025-2026 School Committee Goals: Where we are to date

- i. A summary review of what has been accomplished to date was shared.
 1. Vice Chair Jessica McCready moved to approve the document on School Committee goals and to post it on the School Committee website. Julie Durgin-Sicree seconded the motion.
 - a. ROLL CALL VOTE:
 - i. Ellen Lederer-DeFrancesco: Aye
 - ii. Julie Durgin-Sicree: Aye
 - iii. Betsy Sues: Aye
 - iv. Jessica McCready: Aye
 - v. Karyn Jones: Aye
 1. **Vote: 5-0.** Motion carries.

d. 2025-2026 School Committee Goal: Teaching, Learning, and Technology

- i. Review 7th grade math and the compacted grade 7 / 8 pathway; recommendations; next steps
 1. Karen Wolfson, Math Curriculum Coordinator, shared an update with the Committee on middle school math. She shared the background on why the new course was offered, students scores, course options, course placement, and a recap of middle school math pathways.
 2. Questions were asked regarding placement, online course options, female trend data, the C+ benchmark for monitoring student progress, and feedback related to student stress.
- ii. Monitor the implementation of Policy JICJ, Student Use of Technology in schools; review feedback received this year; next steps
- iii. Review and evaluate the integration of digital resources and instructional technology in classroom instruction; review feedback received this year; administration recommendation regarding possible working group; next steps

1. The Committee shared their thoughts and agreed that they are satisfied with the current progress and will continue to monitor it. A request was made for parent communications to provide updates related to technology.
 2. Administration shared Professional Development looking forward, including team building activities before chrome books are introduced in 6th grade, software restrictions, “turn off time” ability for parental controls and an update to the Student Acceptable Use policy for FY27.
- e. 2025-2026 School Committee Goal: After School Care & Enrichment
- i. Review recommendation from administration on whether or not SPS can provide one classroom in each of the four elementary schools to Park & Recreation for enrichment opportunities for students after school; next steps
 1. An update was provided to the Committee regarding the availability of space in the schools to accommodate an enrichment program in partnership with Park and Recreation.
 2. Due to limited space in the schools, the Committee requested that transportation from the schools to Park and Recreation be considered as a future option.
- f. 2025-2026 School Committee Goal: Family and Community Engagement
- i. Conduct a minimum of two community listening sessions; review feedback from listening sessions; next steps
 - ii. Strengthen and support the School Committee’s Parent Advisory Council(s)
 1. Review feedback from Parent Advisory Councils
 - a. The Committee reviewed the Spring Listening Sessions. They would support continuing to have them but with better messaging when advertising them so there is more awareness of their purpose.
- g. Annual Reorganization of the School Committee
- i. The Committee reorganizes on an annual basis.
 1. Chair Karyn Jones nominates Jessica McCready as Chair and Betsy Sues as Vice Chair. Both McCready and Sues accepted the nominations.
 2. The nominated Chair was asked how conflicts of interest and differences of opinion within the Committee would be handled.
 3. The nominated Vice Chair was asked how they would handle conflict or stressful situations. A member also asked how they could best support the Chair and Vice Chair in their new roles.
 4. Karyn Jones moves to appoint Jessica McCready as Chair of the Sudbury School Committee and member Betsy Sues as Vice Chair for the 2026-2027 term. Julie Durgin-Sicree seconded the motion.
 - a. ROLL CALL VOTE:
 - i. Ellen Lederer-DeFrancesco: Aye
 - ii. Jessica McCready: Aye
 - iii. Betsy Sues: Aye
 - iv. Julie Durgin-Sicree: Aye
 - v. Karyn Jones: Aye

1. **Vote: 5-0.** Motion carries.
- ii. Newly elected Chair, Jessica McCready, ran the meeting from this point forward. The Committee then reorganized the Subcommittees of the School Committee.
- iii. Vice Chair Betsy Sues motioned to appoint Chair Jessica McCready and member Betsy Sues to the Negotiations Labor Relations Subcommittee. Karyn Jones seconded the motion.
 1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Ellen Lederer-DeFrancesco: Aye
 - c. Julie Durgin-Sicree: Aye
 - d. Betsy Sues: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.
- iv. Vice Chair Betsy Sues motioned to appoint members Betsy Sues and Karyn Jones to the Budget Subcommittee. Julie Durgin-Sicree seconded the motion.
 1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Ellen Lederer-DeFrancesco: Aye
 - c. Julie Durgin-Sicree: Aye
 - d. Betsy Sues: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.
- v. Vice Chair Betsy Sues motioned to appoint Chair Jessica McCready and member Ellen Lederer-DeFrancesco to the Superintendent Search Committee. Karyn Jones seconded the motion.
 1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Ellen Lederer-DeFrancesco: Aye
 - c. Julie Durgin-Sicree: Aye
 - d. Betsy Sues: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.
- vi. Vice Chair Betsy Sues motioned to appoint members Karyn Jones and Julie Durgin-Sicree to the Policy Subcommittee. Karyn Jones seconded the motion.
 1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Ellen Lederer-DeFrancesco: Aye
 - c. Julie Durgin-Sicree: Aye
 - d. Betsy Sues: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- vii. Vice Chair Betsy Sues motioned to appoint member Ellen Lederer-DeFrancesco to the Anti-Hate / Anti-Bias Task Force. Karyn Jones seconded the motion.
 - 1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Ellen Lederer-DeFrancesco: Aye
 - c. Julie Durgin-Sicree: Aye
 - d. Betsy Sues: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- viii. Vice Chair Betsy Sues motioned to appoint Chair Jessica McCready and member Betsy Sues as liaisons to the Select Board. Julie Durgin-Sicree seconded the motion.
 - 1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Ellen Lederer-DeFrancesco: Aye
 - c. Julie Durgin-Sicree: Aye
 - d. Betsy Sues: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- ix. Vice Chair Betsy Sues motioned to appoint member Ellen Lederer-DeFrancesco to be the Legislative liaison. Julie Durgin-Sicree seconded the motion.
 - 1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Betsy Sues: Aye
 - c. Ellen Lederer-DeFrancesco: Aye
 - d. Julie Durgin-Sicree: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- x. Vice Chair Betsy Sues motioned to appoint member Julie Durgin-Sicree to be the LS liaison and also the liaison to the LGBTQ+ Parent Advisory Committee. Karyn Jones seconded the motion.
 - 1. ROLL CALL VOTE:
 - a. Betsy Sues: Aye
 - b. Karyn Jones: Aye
 - c. Ellen Lederer-DeFrancesco: Aye
 - d. Julie Durgin-Sicree: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- xi. Vice Chair Betsy Sues motioned to appoint Jessica McCready as liaison to the Health Advisory Council. Julie Durgin-Sicree seconded the motion.
 - 1. ROLL CALL VOTE:
 - a. Betsy Sues: Aye
 - b. Karyn Jones: Aye

- c. Ellen Lederer-DeFrancesco: Aye
 - d. Julie Durgin-Sicree: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- xii. Vice Chair Betsy Sues motioned to appoint Betsy Sues as liaison to the Finance Committee. Jessica McCready seconded the motion.
 - 1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Betsy Sues: Aye
 - c. Ellen Lederer-DeFrancesco: Aye
 - d. Julie Durgin-Sicree: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- xiii. Vice Chair Betsy Sues moves to appoint Karyn Jones and Betsy Sues as liaisons to the Sudbury Special Education Advisory Council. Ellen Lederer-DeFrancesco seconded the motion.
 - 1. ROLL CALL VOTE:
 - a. Betsy Sues: Aye
 - b. Karyn Jones: Aye
 - c. Ellen Lederer-DeFrancesco: Aye
 - d. Julie Durgin-Sicree: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- xiv. Vice Chair Betsy Sues motioned to appoint Karyn Jones to be the Communications liaison. Ellen Lederer-DeFrancesco seconded the motion.
 - 1. ROLL CALL VOTE:
 - a. Betsy Sues: Aye
 - b. Karyn Jones: Aye
 - c. Ellen Lederer-DeFrancesco: Aye
 - d. Julie Durgin-Sicree: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- xv. Vice Chair Betsy Sues motioned to appoint Ellen Lederer-DeFrancesco to the Energy and Sustainability Committee. Julie Durgin-Sicree seconded the motion.
 - 1. ROLL CALL VOTE:
 - a. Betsy Sues: Aye
 - b. Ellen Lederer-DeFrancesco: Aye
 - c. Karyn Jones: Aye
 - d. Julie Durgin-Sicree: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- xvi. Vice Chair Betsy Sues motioned to appoint Jessica McCready as liaison to the Park and Rec Commission. Karyn Jones seconded the motion.
1. ROLL CALL VOTE:
 - a. Betsy Sues: Aye
 - b. Julie Durgin-Sicree: Aye
 - c. Ellen Lederer-DeFrancesco: Aye
 - d. Karyn Jones: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.
- xvii. Vice Chair Betsy Sues motioned to appoint Julie Durgin-Sicree as the MASC Delegate. Betsy Sues seconded the motion.
1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Betsy Sues: Aye
 - c. Ellen Lederer-DeFrancesco: Aye
 - d. Julie Durgin-Sicree: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.
- xviii. Vice Chair Betsy Sues motioned to approve the Budget Subcommittee Charge and the Negotiation Labor Relations Charge as amended. Karyn Jones seconded the motion.
1. ROLL CALL VOTE:
 - a. Betsy Sues: Aye
 - b. Karyn Jones: Aye
 - c. Julie Durgin-Sicree: Aye
 - d. Ellen Lederer-DeFrancesco: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.
- xix. Vice Chair Betsy Sues motioned to approve the Policy Subcommittee Charge as amended. Julie Durgin-Sicree seconded the motion.
1. ROLL CALL VOTE:
 - a. Julie Durgin-Sicree: Aye
 - b. Betsy Sues: Aye
 - c. Karyn Jones: Aye
 - d. Ellen Lederer-DeFrancesco: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.
- xx. Vice Chair Betsy Sues motioned to approve the Superintendent Search Subcommittee Charge as amended. Julie Durgin-Sicree seconded the motion.
1. ROLL CALL VOTE:
 - a. Karyn Jones: Aye
 - b. Betsy Sues: Aye
 - c. Ellen Lederer DeFrancesco: Aye

- d. Julie Durgin-Sicree: Aye
- e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- h. Approval of Athletic and Extracurricular Activity Fees
 - i. The School Committee reviewed the proposed recommendations by Mr. Sawyer.
 - ii. Data on the number of club participants was asked for.
 - iii. This agenda item will be brought to the Budget Subcommittee.
 - i. Review 2026-2027 School Committee Meeting Schedule
 - i. A draft calendar was presented to the Committee.
 - ii. Recommended edits were discussed and approved.
 - 1. Vice Chair Betsy Sues motioned to approve the Fiscal Year 26-27 School Committee Meeting Schedule as amended. Julie Durgin-Sicree seconded the motion.
 - a. ROLL CALL VOTE:
 - i. Karyn Jones: Aye
 - ii. Betsy Sues: Aye
 - iii. Ellen Lederer-DeFrancesco: Aye
 - iv. Julie Durgin-Sicree: Aye
 - v. Jessica McCready: Aye
 - 1. **Vote: 5-0.** Motion carries.
- j. Sudbury Pride Day Attendance
 - i. The Committee discussed pride day and decided who would attend.
 - 1. Vice Chair Betsy Sues motioned that the Sudbury School Committee participate in Sudbury Pride Day and designate School Committee Member Julie Durgin-Sicree to coordinate scheduling and participation of Committee members as the School Committee / Sudbury Public Schools table. Julie Durgin-Sicree seconded the motion
 - a. ROLL CALL VOTE:
 - i. Julie Durgin-Sicree: Aye
 - ii. Ellen Lederer-DeFrancesco: Aye
 - iii. Betsy Sues: Aye
 - iv. Karyn Jones: Aye
 - v. Jessica McCready: Aye
 - 1. **Vote: 5-0.** Motion carries
- k. Community Communication
 - i. A draft communication was shared with the Committee for their review.
 - ii. A question related to whether the Committee's reorganization would be included was asked.
 - 1. Vice Chair Betsy Sues motioned to approve the email communication and 2025-2026 School Committee goals year end report as amended by Karyn Jones. Karyn Jones seconded the motion.
 - a. ROLL CALL VOTE:
 - i. Julie Durgin-Sicree: Aye

- ii. Ellen Lederer-DeFrancesco: Aye
- iii. Betsy Sues: Aye
- iv. Karyn Jones: Aye
- v. Jessica McCready: Aye
 - 1. **Vote: 5-0.** Motion carries.

5. Adjournment

- a. Vice Chair Betsy Sues motioned to adjourn at 9:55 p.m. Ellen Lederer-DeFrancesco seconded the motion.

- i. ROLL CALL VOTE:

- 1. Ellen Lederer-DeFrancesco: Aye
- 2. Karyn Jones: Aye
- 3. Julie Durgin-Sicree: Aye
- 4. Betsy Sues: Aye
- 5. Jessica McCready: Aye
 - a. **Vote: 5-0.** Motion carries.

Respectfully Submitted,
 Julie Williams
 Executive Assistant to the Superintendent

Documents Reviewed During the May 18, 2026 School Committee Meeting

1. 030226_Sudbury School Committee Minutes_DRAFT
2. 031626_Sudbury School Committee Minutes_DRAFT
3. 033126_Sudbury School Committee Minutes_DRAFT
4. Calendar Review Subcommittee Minutes 2.27.26.docx
5. DRAFT - Budget Subcommittee Minutes 4.30.26
6. SC Meeting Warrant Summary - 051826
7. Letter to School Committee Voted Budget_CASE
8. ACCEPT Q3 FY26 Executive Director's report (2) (1)
9. ACCEPT BoD Update Treasurer Q3 report 3.31.26 (1)
10. DRAFT Sudbury Public Schools' Commitment to Addressing Antisemitism and All Forms of Hate and Bias (1)
11. 1. Triennial Review_ LWP Overview May 2026
12. 2. REV 3- DRAFT Welness Policy 5.1.26
13. 3. Final DRAFT Welness Policy 5.8.26
14. 4. SPS Policy Strength Checklist
15. 5. Policy Implementation Assmt
16. Guide for Implementation of SPS School Committee Policy IMDA: Accommodations for Religious and Cultural Observances
17. File_ 1 - BA - SCHOOL COMMITTEE OPERATIONAL GOALS
18. 2-Policy BA-1_ SC Operating Protocols
19. DRAFT-2025-2026 School Committee Goals Working Document
20. Middle School Math Update_Spring 2026
21. Technology Update - SC Goal FY26
22. Enrichment Spaces

23. **Listening Session Summary 04.14.26**
24. **Parent Advisory Council Survey Results**
25. **DRAFT Negotiations-LaborRelationsSubcommitteeCharge**
26. **Draft Budget Subcommittee Charge (1)**
27. **DRAFT Policy Subcommittee Charge**
28. **DRAFT_ Superintendent Search Subcommittee Charge**
29. **Memo_SC_FY27 FeeRecommendation_Athletics and Clubs_260424**
30. **sudbury.k12.ma.us Mail - Fwd_ Clubs**
31. **School Committee Meeting Schedule FY27**
32. **DRAFT Email Communication 2025–2026**
33. **School Committee Goals Year-End Report**

Sudbury School Committee
Meeting Minutes - DRAFT
June 1, 2026

Members Present:

Jessica McCready, Chair
Betsy Sues, Vice Chair
Julie Durgin-Sicree
Karyn Jones
Ellen Lederer-DeFrancesco

Also Present:

Brad Crozier, Superintendent
Annette Doyle, Assistant Superintendent

Absent:

Don Sawyer, Director of Business and Human Resources

Open Regular Session

Chair Jessica McCready opened the meeting. Betsy Sues, Julie Durgin-Sicree, Ellen Lederer-DeFrancesco, Jessica McCready and Karyn Jones all confirmed their presence. Member Jones joined the meeting remotely.

1. Public Comment
 - a. None

2. Educational and Operational Matters
 - a. District Reports
 - i. Director of Business and Human Resources
 1. None. Mr. Sawyer was not present.
 - ii. Assistant Superintendent
 1. Tomorrow the LS Seniors are coming back for Alumni Day where they visit each of the elementary schools they attended, followed by a day of service on Wednesday.
 2. Curtis Middle School was represented by 16 students at the Mass Civics Challenge in Worcester.
 - iii. Superintendent
 1. End of year events such as Fun Runs, Art Shows, Global Spotlight, Field Days, 4E, elementary visits to the middle school and music concerts are all underway.
 2. Kindergarten Orientation is this Wednesday.
 3. HOPEsudbury is again partnering with SPS on the annual backpack drive.

 - a. Anti-Hate/Anti-Bias Task Force Update

- i. Superintendent Crozier shared an update on the work the Task Force has completed to date.
- ii. Questions from the committee surrounded whether the Task Force or a Parent Advisory Council (PAC) would be the correct approach, if meeting schedules could accommodate new member Lederer-DeFrancesco, how school climate data and feedback would be reviewed moving forward, and the steps followed when an incident is reported.

3. Consent Calendar

- a. Approval of Minutes (04/13/2026)
- b. Additional space request Sudbury Extended Day
- c. FY27 Washington, D.C. Trip approval
 - i. A question related to the SED space request memo and procedure related to securing space was asked.
 1. Vice Chair Betsy Sues motioned to approve the Consent Calendar as amended. Julie Durgin-Sicree seconded the motion.
 - a. ROLL CALL VOTE:
 - i. Betsy Sues: Aye
 - ii. Julie Durgin-Sicree: Aye
 - iii. Ellen Lederer-DeFrancesco: Aye
 - iv. Karyn Jones: Aye
 - v. Jessica McCready: Aye
 1. **Vote: 5-0.** Motion carries.

4. Business and Policy Matters

- a. 2026-2027 Committee Expectations, Practices and Meeting Norms
 - i. The Committee reviewed standards for adding future agenda items, agenda packet preparation and community communication protocols, and policy items. Clarification was also provided regarding future agenda items.
 1. Vice Chair Betsy Sues motioned to reaffirm our commitment to remain respectful of School Committee norms and processes as discussed in the June 1st, 2026 meeting. Julie Durgin-Sicree seconded the motion.
 - a. ROLL CALL VOTE:
 - i. Betsy Sues: Aye
 - ii. Julie Durgin-Sicree: Aye
 - iii. Ellen Lederer-DeFrancesco: Aye
 - iv. Karyn Jones: Aye
 - v. Jessica McCready: Aye
 1. **Vote: 5-0.** Motion carries.
- b. FY27 School Committee Meeting Schedule Updates
 - i. Modifications to the FY27 proposed schedule were discussed and approved with a request to have agenda packets available earlier.
 1. Vice Chair Betsy Sues motioned to approve the Committee Meeting Schedule as amended. Julie Durgin-Sicree seconded the motion.

- a. ROLL CALL VOTE:
 - i. Betsy Sues: Aye
 - ii. Julie Durgin-Sicree: Aye
 - iii. Ellen Lederer-DeFrancesco: Aye
 - iv. Karyn Jones: Aye
 - v. Jessica McCready: Aye
 - 1. **Vote: 5-0.** Motion carries.

- c. Appointment of members to the FY28 Budget Working Group
 - i. The Committee discussed appointing members to the working group.
 - ii. Vice Chair Betsy Sues motioned to appoint Karyn Jones and Betsy Sues to the Town Budget Working Group. Julie Durgin-Sicree seconded the motion.

- 1. ROLL CALL VOTE:
 - a. Betsy Sues: Aye
 - b. Julie Durgin-Sicree: Aye
 - c. Ellen Lederer-DeFrancesco: Aye
 - d. Karyn Jones: Aye
 - e. Jessica McCready: Aye
 - i. **Vote: 5-0.** Motion carries.

- d. Begin discussion on 2026-2027 School Committee Goals
 - i. Each School Committee member had an opportunity to share ideas for future School Committee goals. Suggested focus areas included community and family engagement, academic achievement and student supports, student well-being and belonging, specialist and STEM opportunities, fiscal stewardship, long-term budget planning, two-way communication, AI policy guidelines, and gaining a deeper understanding of the student academic and wellness experience.
 - ii. A suggestion to include the Superintendent Search was recommended.
 - iii. The Committee will continue to work on defining their goals in future meetings.

- e. Committee Communication Strategies
 - i. The Committee engaged in discussion about how to improve communication with the community.
 - ii. An interest in consolidating communications was shared with future discussions planned.

- f. Approval of Athletic and Extracurricular Activity Fees
 - i. Mr. Sawyer's fee recommendations were included in the agenda packet. The Committee reviewed the proposed student athletic and club fees and discussed concerns regarding the number of clubs not meeting the minimum student participation.
 - ii. Questions surrounded scholarship availability, the process for creating new clubs, advisor compensation and lowest club enrollment data. Members also discussed whether clubs should follow the same minimum student requirements as athletics.
 - iii. In the absence of Don Sawyer, the Committee decided to bring the club fees to a future agenda for a vote.

1. Vice Chair Betsy Sues motioned to approve the athletic fees as presented. Julie Durgin-Sicree seconded the motion.
 - a. ROLL CALL VOTE:
 - i. Betsy Sues: Aye
 - ii. Julie Durgin-Sicree: Aye
 - iii. Ellen Lederer-DeFrancesco: Aye
 - iv. Karyn Jones: Aye
 - v. Jessica McCready: Aye
 1. **Vote: 5-0.** Motion carries.
5. Future Agenda Items
 - a. A member requested to discuss a Jewish PAC vs. Task Force.
6. Adjournment
 - a. Vice Chair Betsy Sues motioned to adjourn at 9:15 p.m. Julie Durgin-Sicree seconded.
 - i. ROLL CALL VOTE:
 1. Betsy Sues: Aye
 2. Julie Durgin-Sicree: Aye
 3. Ellen Lederer-DeFrancesco: Aye
 4. Karyn Jones: Aye
 5. Jessica McCready: Aye
 - a. **Vote: 5-0.** Motion carries.

Respectfully Submitted,
Julie Williams
Executive Assistant to the Superintendent

Documents Reviewed During the June 1, 2026 School Committee Meeting

1. 06012026 Anti hate/Bias Initial Progress Report
2. 041326_Sudbury School Committee Minutes_DRAFT
3. SED_FY27 Additional Space Rent Agreement_Haynes_260527
4. SED_FY27 Additional Space Rent Agreement_Loring_260527
5. SC proposal on letterhead 2026
6. SchoolCommitteeHandbook_Updated_March22026
7. Item4a_060126.docx
8. School Committee Meeting Schedule FY27 (1)
9. GarofaloEmail_051926
10. FINAL-2025-2026 School Committee Goals Working Document (1)
11. Mockup
12. Memo_SC_FY27 FeeRecommendation_Athletics and Clubs_260424

Additional Documents Reviewed

1. scan_joyced_2026-02-26-09-23-44 (1)
2. SPS Communications (2)
3. TPG_Weston Communications Audit_260123-1
4. TPG_Weston Invoice 260213 (1)
5. Weston Inv 26-050 EDComm 2026 03 31

6. WESTON PUBLIC SCHOOLS Contract_Perry Group_ (1) - signed



SUDBURY PUBLIC SCHOOLS

Office of the Director of Business and Human Resources

To: School Committee

Date: 6/11/26

RE: FY26 Accounts Payable & Payroll Warrants Processed

With the required School Committee approvals received, the following Accounts Payable Warrants and Payroll Warrants were processed for payment during the current period:

<u>Date:</u>	<u>Warrant Type:</u>	<u>Warrant #:</u>	<u>Amount \$:</u>
6/11/26	Accounts Payable	2128	\$13.09
6/11/26	Accounts Payable	1270	\$69,124.89
6/4/26	Accounts Payable	1269	\$368,350.75
5/28/26	Accounts Payable	1268	\$242,921.91
5/21/26	Accounts Payable	1267	\$466,502.71
5/21/26	Accounts Payable	1266	\$10.57
5/21/26	Accounts Payable	1265	\$582.48
6/5/26	Payroll	P/R 6/11/26	\$1,804,765.63
6/2/26	Payroll	P/R 6/2/26	\$1,000.00
5/22/26	Payroll	P/R 5/28/26	\$1,737,439.84

Donald R. Sawyer
Director of Business and Human Resources

**Sudbury Public Schools
School Committee Meeting**

Date: July 6, 2026

Agenda Item: 6a. Combined Facilities Director
i. Haynes and Nixon Roof Projects Update
ii. Solar Panel Update
iii. Cafeteria Tables
iv. Fire Alarms

Recommendation:

6a iii. Motion to surplus (x) number of cafeteria tables from (name of school).

Background / Preparation Information:

Sandra Duran, Combined Facilities Director, will present information to the Committee on a few topics. She will give brief updates on the Haynes and Nixon Roof Projects and the Solar Panel project . No action is needed by the committee on these items. (2) She will also talk to us about cafeteria tables that she wants to move to surplus so she can make space for ADA compliant cafeteria tables. (3) Lastly she will present to us about Fire Alarm work slated for Haynes and Nixon. Sandra recommended and Annette agreed that we will move forward with the work at Haynes and re-bid the Nixon project in the Fall.

Attachments:

Action: XX **Report:** **Discussion:** XX

**Sudbury Public Schools
School Committee Meeting**

Date: July 6, 2026

Agenda Item: 6b. Superintendent Search Process

Recommendation:

Motion to authorize a procurement officer to develop and issue a written request for quotations for Superintendent Executive Search Consulting Services.

Background / Preparation Information:

1. The Committee will discuss and vote on moving forward with the formal Procurement Process for a search firm for the superintendent search. Our attorney has stated that services that fall within \$10,000 and \$100,000 go through the Request for Proposals (RFP). This process requires seeking quotes from at least three entities and is consistent with G.L. c. 30B, § 4. The packet contains an overview document and an example RFP from Andover. Please review the documents and bring feedback and input you would want incorporated into our RFP request. We will be voting on this in the meeting.
2. The packet also contains links to the processes followed by local districts and the previous search by SPS and LS when Brad Crozier and Andrew Stephens were hired. Feel free to look up other districts - I do not pretend to think this is an exhaustive list! Please review the members of the Screening Committee in the documents and come to the meeting prepared with an idea of who you would want on our Screening Committee. Please think about what categories of individuals you would want represented. Do NOT suggest individual names, simply categories, i.e. educator, parent, Select Board member, etc. We will discuss these categories as a committee but not vote on a final Screening Committee in this meeting.
3. Please also review the documents for the timeline of local districts and the SPS and LS searches. Come to the meeting prepared with an idea of a basic timeline you would like to see for our superintendent search. The start date of the new Superintendent will be July 1, 2027 so that should be the end date of your timeline. We will discuss everyone's timeline in this meeting but not vote on a final version until a later meeting.

Attachments:

- 1 - 7.6.26 SPS Super Search .docx
- 2 - Example RFP Andover.pdf
- 3 - 7.6.26 LS and SPS Super Search Summary .docx
- 4 - Westwood.pdf
- 5 - ShrewsburyTimeline.pdf
- 6 - Shrewsbury Screening Committee.pdf
- 7 - Andover.pdf
- 8 - Weston Timeline.pdf

Action: XX **Report:** **Discussion:** XX

Superintendent Search Services

Written Solicitation for Superintendent Search Services

Anticipated Procurement Process

Based on current legal guidance, the District should treat this as a written quotation process for services expected to exceed \$10,000 but remain below \$100,000.

The Committee will want to define the quality of service needed through the written description. For example, the solicitation can require relevant superintendent-search experience, a clear recruitment strategy, community-engagement capacity, assigned consultant qualifications, transparent pricing, and contract protections. The process should be qualifications-focused while remaining consistent with procurement requirements.

Anticipated Scope of Services

The written solicitation should ask each firm to describe its recommended level of service and identify what is included in the base fee versus optional services. A comprehensive superintendent search typically includes the following service areas:

Service area	Examples of work a firm may perform
Planning and process design	Kickoff meeting; search calendar; roles and responsibilities; communication protocol; proposed meeting sequence.
Community engagement and leadership profile	Stakeholder survey, focus groups, interviews, or forums; synthesis of input; development of a leadership profile and selection criteria.
Recruitment and advertising	Position announcement; candidate prospectus; active outreach; advertising; use of professional networks and candidate databases.
Application management and screening	Collection and organization of applications; screening rubric; candidate status tracking; preliminary review against agreed criteria.
Due diligence	Reference checks, licensure/credential review, background or media checks if included, and identification of any concerns for the Committee.
Finalist process	Interview questions and materials; finalist schedules; site visits; stakeholder feedback process; support for public interviews or finalist forums as appropriate.
Appointment and transition	Support for selection, contract-negotiation strategy, public announcement, onboarding, and early transition planning.

Service-Level Questions for Firms

Because firms may offer different levels of assistance, the solicitation should ask each firm to explain what its process looks like and what additional costs may apply. Examples include:

- What is included in the base scope, and what services are optional or separately priced?
- How would the firm gather community input in a way that is broad, respectful, transparent, and useful for developing selection criteria?
- How would the firm recruit qualified candidates, including sitting superintendents or leaders in comparable districts?
- What candidate-pool information will be reported to the Committee, such as applications received, candidates actively recruited, semifinalists, finalists, and reasons a search may need to be extended?
- What support is provided if no appointment is made, if the selected candidate does not start, or if the selected candidate leaves shortly after appointment?
- What transition or onboarding services are included after appointment?

Items to Address in the Written Solicitation and Contract

- All-inclusive fixed fee or not-to-exceed fee, with optional services and expenses separately identified.
- Named lead consultant and proposed team, with limits on substitution without District approval.
- Disclosure of prior District work, personal or professional conflicts, and any candidate-related conflicts.
- Clear statement of what happens if the search must be extended, reopened, or repeated.
- Protection if the selected candidate does not start or leaves shortly after appointment, subject to legal review.

- Restriction on the firm recruiting the appointed superintendent away from the District for a defined period, subject to legal review.
- Confidentiality, records retention, public records, and compliance with applicable Massachusetts public-sector requirements.

Potential Firms to Consider Soliciting

The following examples are provided only to illustrate the type of market that may be reviewed. They are not ranked, recommended, or intended to exclude other qualified firms or individual consultants.

Category	Illustrative examples
Regional / Massachusetts / New England examples	NESDEC; MASC; HYA; UMass Boston Collins Center for Public Management; other qualified Massachusetts or New England consultants.
National educational executive search examples	Ray & Associates; McPherson & Jacobson; BWP & Associates; other qualified national K-12 executive search firms with relevant public-school superintendent search experience.

ANDOVER SCHOOL COMMITTEE VIRTUAL MEETING MINUTES

January 30, 2026

MEMBERS PRESENT: S. Murray, Chair
J. Tamarkin
C. Shepley
L. Conoscenti, Vice Chair
L. Diffenbach

MEMBERS ABSENT:

OTHERS PRESENT: Theresa Peznola, Town Purchasing Agent

Call to Order – Ms. Murray, Chair, called the School Committee Meeting of January 30, 2026, to Order at 1:00pm.

A. New Business

1. Permanent Superintendent Search

This meeting is to assist the School Committee with the next steps for the Superintendent Search. Theresa Peznola will review the RFP process for the School Committee.

Ms. Peznola advised the School Committee that the RFP is specific to MGL Ch.30B-the acquisition of goods and services. The benefit of an RFP is to compare proposals to find the proposal that is most beneficial not based on price, but by their abilities. The scope of services will include the criteria to measure their abilities and availability to meet our deadline. The RFP will be open for 3-4 weeks to allow time for companies to submit a complete and comprehensive proposal.

Mr. Tamarkin asked if there was a way to shorten the timeline for this process or use local resources instead of an RFP. Discussion followed regarding using MASC compared to the RFP process.

Ms. Peznola informed the School Committee that a template of the contract is included with the RFP with the specific requirements. The companies will submit both a technical proposal and a price proposal; they must have insurance in place and have the availability to begin by mid-March 2026. Under the law, RFPs are reviewed and decisions made based on skill, credentials, etc. Once the choice is made which company will be moving forward, then the price proposal is opened. The selection is made without price being the motivating factor. The budget is set in advance, however, pricing is not a criterion in the RFP process.

Mr. Tamarkin stated that the price for MASC is less than \$50,000 and we are making an effort to not expend funds for outsourcing. Ms. Murray contacted MASC and NEASC regarding a search firm, and the School Committee would be conducting public forums etc. MASC is extremely busy and recommended an interim Superintendent for the 2026-2027 school year because they could not get the search completed in time for July 1, 2026. Discussion followed regarding the RFP process benefits. The School Committee is not obligated to hire anyone even after undergoing the RFP process.

The Municipality and School Department will make the final decision about making an offer to the chosen search firm. Language can be added to the RFP to give us the right to modify the date of hire.

Dr. Conoscenti stated that if the School Committee was to handle the search internally, it would be a lot of work at a very busy time for the Committee. She believes hiring experts to assist with the search is best option and it allows the School Committee to maintain distance from the process. The search firm will also have a much broader reach for candidates than the School Committee.

Ms. Diffenbach stated that the use of an outside agency and use of money for this is a concern, however she agreed that the RFP is the best option for this process. Dr. Conoscenti informed the School Committee that the funds to pay for the search firm will come from the FY26 budget, not the FY27 budget.

Ms. Peznola requested there be one contact person to work on the contents of the RFP and to make edits. Any amendments to the RFP will be sent to Ms. Murray and she will work with the Purchasing Agent. The timeframe for releasing the RFP and advertising was discussed. The timeframe for the RFP to be open will be 2 weeks, applications will be due February 26, 2026, with advertising taking place February 9 and 12, 2026.

Ms. Diffenbach moved that the Andover School Committee authorize the issuance of a Request For Proposal under M.G.L. ch30B for qualified firms or individual consultants to provide executive search consultant services for the position of Superintendent of Schools and to authorize the Chair, Ms. Murray, to work with the Purchasing Agent. The motion was seconded by Mr. Tamarkin and unanimously approved 5-0 by Rollcall vote:

**J. Tamarkin – yes C. Shepley – yes L. Diffenbach – yes
L. Conoscenti – yes S. Murray – yes**

Ms. Diffenbach left the meeting. Dr. Conoscenti moved that the Andover School Committee vote to adjourn the meeting at 1:59pm. The motion was seconded by Mr. Tamarkin and unanimously approved 4-0 by a Rollcall vote:

**J. Tamarkin – yes C. Shepley – yes
L. Conoscenti – yes S. Murray – yes**

The Meeting was adjourned at 1:59pm.

Submitted By: _____
Lynn Viselli, Recording Secretary

Approved: _____
Date

Superintendent Search Context

Historical Process Review and Current-Process Considerations

1. Purpose

This memo summarizes available historical information regarding the two most recent superintendent searches connected to Sudbury: the Sudbury Public Schools 2017–2018 search and the Lincoln-Sudbury Regional High School 2022–2023 Superintendent/Principal search.

The information is provided solely as background context to help the Committee understand how those prior searches were structured and conducted.

2. Side-by-side snapshot

Topic	SPS 2017-2018	L-S 2022-2023
District / grades	Sudbury Public Schools, K-8	Lincoln-Sudbury Regional High School, 9-12
Search cycle	2017-2018, for a July 1, 2018 start	2022-2023, for a July 1, 2023 start
Search firm / consultant support	Collins Center for Public Management	MASC
Initial search body	School Committee managed the process with consultant support and an 11-member screening/search committee	Three-member Superintendent/Principal Search Subcommittee plus a broader 11-member screening/steering committee
Application pool	35 applications reported	24 applicants reported over an approximately three-month period
Initial interviews	Eight applicants selected for interviews	Six applicants selected for the initial screening process
Finalist phase	Four finalists were initially named publicly; one withdrew, leaving three finalists for public process steps	Three finalists advanced to public interviews and visits
Final appointment	A candidate was selected in March 2018, subject to contract discussions and approval	A candidate was appointed on April 5, 2023, subject to successful contract negotiation

3. Sudbury Public Schools 2017-2018 superintendent search

Process summary

- SPS used the Collins Center for Public Management as outside search support.
- SPS used an 11-member screening/search committee for confidential early-stage review and interview work, while the full School Committee retained the final appointment role.
- The process moved from committee formation and stakeholder input in December 2017 to finalist interviews, site visits, and selection in March 2018 for a July 1, 2018 start.
- Public reporting stated that SPS received 35 applications; the screening/search committee reviewed resumes, selected eight applicants to interview, and advanced finalists to the School Committee.

Timeline of the 2017-2018 SPS search

Date / window	Step	Detail
By Dec. 4, 2017	Search setup / committee recruitment	Community email sought letters of interest for the Superintendent Search Committee; SPS was looking for two parent volunteers and one SEPAC member.
Dec. 4, 2017	Central office focus group approved	School Committee approved a separate central office focus group with the Collins Center at an added cost of \$500.
Dec. 18, 2017	School Committee focus group / slate vote expected	Minutes identified this date for the School Committee focus group and anticipated vote on the screening committee slate.
Jan. 8, 2018	Vision statement / position description reviewed	A Collins Center representative joined the School Committee to discuss the vision statement, described in the minutes as the superintendent position description.

Date / window	Step	Detail
Jan. 11, 2018	Screening committee work began	Minutes listed Jan. 11 as a required screening committee meeting date; local reporting later stated the committee met five times between Jan. 11 and Feb. 9.
Jan. 17, 2018	Applications due	Local reporting stated that applications were due by Jan. 17.
Jan. 22, 2018	Screening committee meeting	Listed in the Dec. 4 minutes as another required screening committee date.
Week of Feb. 5, 2018	Initial interviews	The screening committee reviewed resumes and selected eight applicants to interview during the week of Feb. 5.
Jan. 11-Feb. 9, 2018	Screening committee review period	Local reporting stated that the committee met five times during this window.
Feb. 14-15, 2018	Finalists named publicly	School Committee held a special meeting to name recommended finalists; four finalists were reported publicly.
Feb. 22, 2018	Finalist slate reduced to three	One finalist withdrew after accepting another superintendent position, leaving three finalists for public process steps.
Feb. 27-Mar. 1, 2018	Finalist forums / visits	Public forums occurred on separate evenings, with school visits and staff forums held on the same days.
Mar. 6, 2018	School Committee finalist interviews	Full School Committee interviews were scheduled at Curtis Middle School.
Week of Mar. 13, 2018	Site visits and decision	School Committee site visits to finalists' districts were scheduled, with discussion and decision scheduled for that week.
March 2018	Selection announced	A final candidate was selected, pending contract discussions and approval.
July 1, 2018	Anticipated start date	The appointment was expected to begin July 1, 2018.

Screening/search committee composition

The public record uses both "Screening Committee" and "Superintendent Search Committee" to refer to the 11-member group that performed confidential early-stage work before finalists were presented to the full School Committee. The table below focuses on roles and representation categories rather than individual names.

Representation category	Role reflected in public records	Count
School Committee	School Committee chair and vice chair	2
Central office / district administration	Director of Business and Finance	1
Special education parent advisory council	SEPAC representative	1
Community / parent	Community members / SPS parents	2
Building leadership	Middle school principal	1
Teacher / professional staff	SPS faculty members	3
Municipal / town administration	Town Manager	1
Total	11-member screening/search committee	11

Finalist phase and final selection

Four finalists were initially named publicly. One finalist later withdrew after accepting another superintendent position, leaving three finalists for public forums, school visits, staff forums, School Committee interviews, and site visits. The final district announcement also referenced a site visit team that included district representatives and School Committee members. The current-process takeaway is procedural: the finalist stage included public engagement, staff input, School Committee interviews, and site visits before final selection.

4. Lincoln-Sudbury Regional High School 2022-2023 Superintendent/Principal search

Process summary

- L-S used MASC as outside search support, following School Committee action on the search-firm approach.
- The full School Committee appointed a three-member Superintendent/Principal Search Subcommittee in October 2022.

- L-S also used an 11-member screening/steering committee, including L-S School Committee members, liaisons from Sudbury Public Schools and Lincoln Public Schools, L-S faculty, L-S administrators, and community members from both Lincoln and Sudbury.
- The process included public forums and surveys, a February job posting, a February 28 application deadline, early March screening, March finalist visits/interviews, and an April 5 final vote.
- L-S reported 24 applicants, selected six applicants for initial screening, and advanced three finalists to public process steps.
- The School Committee voted on April 5, 2023 to appoint a Superintendent/Principal effective July 1, 2023, subject to successful contract negotiation.

Timeline of the 2022-2023 L-S search

Date / window	Step	Detail
Oct. 2022	Departure announced / search structure begins	The outgoing Superintendent/Principal announced that she would leave L-S at the end of the 2022-2023 school year. The School Committee appointed a three-member Superintendent/Principal Search Subcommittee.
Dec. 15, 2022	Search firm selected by subcommittee	The Search Subcommittee discussed search firm options and voted to choose MASC.
Dec. 2022	Steering/screening committee appointed	The L-S April 5 minutes state that a steering committee was appointed in December 2022. The L-S School Committee page later listed an 11-member screening committee.
Late 2022-Feb. 2023	Public forums, surveys, and search profile	MASC oversaw public forums and surveys to collect public input on leadership attributes and district needs. This information was used to create the job posting in February 2023.
Feb. 28, 2023	Application deadline	L-S posted a search timeline with February 28 as the deadline for applications.
Mar. 3, 2023	Semi-finalists selected	The posted search timeline identified March 3 for semi-finalist selection.
Mar. 9-16, 2023	Semi-finalist interviews	The posted search timeline identified March 9-16 for interviews. Minutes state that six applicants were selected for the initial screening process.
Mar. 21 / Mar. 23, 2023	Finalists announced / accepted	The posted timeline listed March 21 for finalist announcement. March 23 minutes show the School Committee voted to accept three recommended finalists.
Mar. 28-30, 2023	Finalist visits	Finalists visited L-S on separate days. Visits included tours, meetings, and forums for staff, students, and community members.
Mar. 31, 2023	Final School Committee interviews	The School Committee held final interviews with the candidates.
Apr. 5, 2023	Final deliberation and vote	The School Committee voted to appoint a Superintendent/Principal effective July 1, 2023, subject to successful contract negotiation.
Apr. 7, 2023	Public announcement	A public message announced the appointment.
July 1, 2023	Effective start date	The appointment was effective July 1, 2023, subject to contract negotiation.

Screening/steering committee composition

The L-S public record uses related terms, including Search Subcommittee, screening committee, and steering committee. The three-member Search Subcommittee was made up of L-S School Committee members and chaired the process. The broader 11-member committee included the categories shown below.

Representation category	Role reflected in public records	Count
L-S School Committee / search subcommittee	Three School Committee members serving on the search subcommittee	3
Sending district liaison / SPS	Liaison from Sudbury Public Schools	1
Sending district liaison / Lincoln	Liaison from Lincoln Public Schools	1
Faculty / department leadership	L-S faculty and department leadership roles	2
Administration / student supports	L-S administration, counseling/student supports, and METCO leadership roles	2
Community member	Community members from Lincoln and Sudbury	2
Total	11-member screening/steering committee	11

Finalist phase and final selection

Three finalists advanced to public process steps. Public materials identified the finalists by their then-current leadership positions in nearby high schools. Each candidate visited L-S on a separate day during March 28-30, 2023. The School Committee held final

interviews on March 31 and deliberated on April 5 before voting on the appointment. The current-process takeaway is procedural: the finalist phase combined candidate visits, staff/student/community opportunities for input, School Committee interviews, and a public final vote.



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Superintendent Search Subcommittee



Creation of the Search Committee

In December 2022, the Westwood School Committee began the process of hiring a new Superintendent.

Consultant:

In January 2023, the School Committee engaged James Hardy, Field Director for the Massachusetts Association of School Committees ([MASC](#)), to serve as an independent consultant to assist with the recruiting process. Mr. Hardy has been a member of the MASC staff for over twenty-five years and has been lead consultant on more than five dozen superintendent searches.

Search Committee:

In communications to both District parents/guardians and District faculty and staff, the School Committee sought out community representatives to serve on the Superintendent Search Committee, which would screen applications, conduct initial interviews, and recommend several candidates to the School Committee as finalists. The members of the Search Committee are as follows:

Tony Mullin, Co-Chair -- Member, School Committee

Maya Plotkin, Co-Chair -- Member, School Committee

Rob Gotti -- Westwood Select Board

Lateefah Franck -- Director of Equity, Integration & Community Partnerships

Amy Davenport -- Principal, Westwood High School

Kristen Evans -- Principal, Sheehan School

Tien-lih Chen -- Teacher, Deerfield School

Justyne Collier - Teacher, Thurston Middle School

Alison Donahue -- Teacher, Westwood High School

Emily Kessel -- Teacher, Hanlon School

Orla Averill -- Parent

Theresa Laham -- Parent

Brian Regan -- Parent

Liz Volpe -- Parent

Riley Harrington -- WHS Student

2023 Timeline

March 1 -- Applications due

Week of March 6 -- Semi Finalists selected

Week of March 13 -- Semi Finalist interviews/finalists selected by Search Committee

Week of March 20 -- Finalist interviews with School Committee and community site visits

Week of March 27 -- New superintendent selected

July 1 -- Start date for new superintendent

Communications

[2023-3-24 Superintendent Search Committee Update](#)

[2023-3-22 Superintendent Search Committee Update](#)

[2023-3-20 Superintendent Search Committee Update](#)

[2023-1-11 Superintendent Search Committee Update](#)

[2022-12-19 Superintendent Search Committee Update](#)

Meeting Postings

[2023-3-7 Meeting \(Minutes\)](#)

[2023-3-13 Meeting \(Minutes\)](#)

[2023-3-14 Meeting \(Minutes\)](#)

[2023-3-15 Meeting \(Minutes\)](#)

[2023-3-16 Meeting \(Minutes\)](#)

[2023-3-17 Meeting \(if needed\) \(Minutes\)](#)

[2023-3-22 Interview](#)

[2023-3-23 Interview](#)

[2023-3-24 Interview](#)

[2023-3-27 Deliberation](#) : [Link to livestream](#)

Finalists

[Ian P. Kelly, Ed.D., Interim Superintendent, Dedham Public Schools](#)

[Rebecca H. Kidwell, Assistant Superintendent for Curriculum, Instruction, Assessment, & Professional Development, Rockland Public Schools](#)

[Timothy P. Piwowar, Superintendent, Billerica Public Schools](#)

Community Forum Live Streams

[Timothy Piwowar](#)

[Rebecca Kidwell](#)

[Ian Kelly](#)

Candidate Interviews with School Committee

[Ian Kelly](#)

[Rebecca Kidwell](#)

[Timothy Piwowar](#)

Questions?

If you have any questions, please reach out to [Harley Pease](#), Executive Assistant to the Superintendent at hpeace@westwood.k12.ma.us .

District Office

220 Nahatan Street
Westwood, MA 02090
Phone:781-326-7500
Fax:781-326-8154
Directions

Westwood High School

200 Nahatan Street
Westwood, MA 02090
Phone:781-326-7500
ext.3301
Fax:781-461-8561
Directions

Thurston Middle School

850 High Street
Westwood, MA 02090
Phone:781-326-7500
ext.2336
Fax:781-326-2709
Directions

Downey School

250 Downey Street
Westwood, MA 02090
Phone:781-326-7500
ext.8386
Fax:781-329-7642
Directions



Martha Jones School

80 Martha Jones Road
Westwood, MA 02090
Phone:781-326-7500
ext.7422
Fax:781-255-9277
Directions

Pine Hill School

790 Gay Street
Westwood, MA 02090
Phone:781-326-7500
ext.8424
Fax:781-326-2702
Directions

Sheehan School

549 Pond Street
Westwood, MA 02090
Phone:781-326-7500
ext.7100
Fax:781-769-8046
Directions

Westwood Integrated PreSchool

200 Nahatan Street
Westwood, MA 02090
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New England School Development Council

**SHREWSBURY PUBLIC SCHOOLS
SUPERINTENDENT SEARCH
SCREENING AND INTERVIEW WORKSHOP
MEETING #1:**

PUBLIC SESSION

1. INTRODUCTIONS

- a. Role of consultant
- b. Role of Screening Committee
- c. Role of School Committee

2. OVERVIEW OF SEARCH PROCESS

- a. Status of search to date
- b. Search timeline

3. SUCCESSFUL CANDIDATE PROFILE

- a. Overview of community input and School Committee analysis
- b. Use of the *Successful Candidate Profile* in preliminary screening process

4. REVIEW PRELIMINARY SCREENING PROCESS

- a. Managing applications
- b. Determining applicants for interview
- c. Guidelines for conducting preliminary screening interviews
- d. Guidelines for recommending applicants for further consideration by School Committee

5. ORGANIZING FOR THE PRELIMINARY INTERVIEWS

- a. Set dates for interviews
- b. Schedule/length
- c. Select themes
- d. Develop interview questions
- e. Determine location for interviews
- f. Greeter/escort
- g. Selection procedure

6. CONDUCTING THE INTERVIEW

- a. Ice-breaker
- b. Questions based upon approved themes
- c. Type of questions to avoid
- d. Listening and observing
- e. Closing the interview
- f. Taking notes

7. OTHER ISSUES

- a. Confidentiality vital
 - 1) No contact with references or other sources
 - 2) Review acceptable Internet sources
- b. Communicating with the press and with colleagues

EXECUTIVE SESSION

8. REVIEW OF APPLICATIONS

HOMEWORK

- Review Candidate Profile
- Review applications
- Complete "Rating Sheet"
- Develop Interview questions
- Check your calendar

Date of next meeting:

Massachusetts Open Meeting Law Excerpts and Notes

The Screening Committee will hold all discussions of candidates in Executive session. It is allowed to under

#8

To consider or interview applicants for employment or appointment by a preliminary screening committee if the chair declares that an open meeting will have a detrimental effect in obtaining qualified applicants: provided however, that this clause shall not apply to any meeting, including meetings of a preliminary screening committee, to consider and interviews who have passed a prior preliminary screening.

The Screening Committee will keep minutes of all open sessions

OPEN SESSION Meeting Records (minutes)

The Open Meeting Law requires public bodies to create and approve minutes in a timely manner. A “timely manner” is considered to be within the next three public body meetings or 30 days from the date of the meeting whichever is later.

Materials or other exhibits used by the public body in an open meeting must also be made available to the public within ten days of a request.

Please note: There are two exemptions to the open session records disclosure requirements 1) materials (other than those created by members of the public body for the purpose of the evaluation) used in performance evaluation of an individual bearing on the person’s professional competence, and 2) materials (other than any resume submitted by an applicant, which is subject to disclosure) used in deliberations about employment or appointment of individuals, including applications and supporting materials. Documents created by members

DRAFT: SHREWSBURY PUBLIC SCHOOLS: TIMELINE/TASKS FOR SELECTING A SUPERINTENDENT

Task	RESPONSIBILITIES	DATE(S)
Orientation Meeting/ Overview of Process	School Committee (review/decisions) (NESDEC provides guidelines) - Name Liaison - Approve Draft Timeline - Discuss letter/ads/application - Establish salary range (ongoing) - Determine Composition of Screening Committee	On or before December 19, 2025
Anticipated Start Date for New Superintendent	SCHOOL COMMITTEE	July 1, 2026
Develop Invitational Letter & Online Ad	NESDEC: Develops letter and ads School Committee/Liaison: Final approval NESDEC website announcement posted as soon as info is available.	Text approved by December 18, 2025
Distribute Letter, Advertise, Post Vacancy on Web Sites, Begin Recruiting	NESDEC Website and Recruiting Network (No School)	Posting to begin on or before December 22, 2025 Recruitment through January 20, 2026
Community Needs Assessment: Focus Groups, Surveys Personal Interviews	School Committee: Determines focus groups i.e. Admin; Staff; Community/Parents. DISTRICT with NESDEC support: Schedules and notifies public, staff, etc. NESDEC: Conducts focus groups/interviews/online survey and develops draft candidate profile.	January 2-9, 2026
Draft Candidate Profile Submitted to SC	SCHOOLCOMMITTEE/NESDEC	January 13 , 2026
School Committee approves Successful Candidate Profile	SCHOOL COMMITTEE/NESDEC	By February 16, 2026
Screening Committee Selection: Advertise/Recruit and Select Members.	SCHOOL COMMITTEE/LIAISON (NESDEC provides guidance)	Completed by January 12, 2026
Begin Review of Applications – (i.e. Application Deadline)	NESDEC	January 20, 2026
1st Interview/Selection Workshop with Screening Committee (2-3 hrs.)	NESDEC & SCREENING COMMITTEE Meeting 1: Review procedures, develop questions, set interview schedule, receive applications	January 20, 2026 6:30-9:00 P.M.
2nd Screening Committee Workshop (2- 3 hrs.)	Meeting 2: Review applications, affirm interview questions and schedule	January 26, 2026 6:30-9:00 P.M.
Preliminary Interviews of Selected Applicants	SCREENING COMMITTEE (NESDEC will set up interviews and notify candidates of status)	January 31, 2026 & February 7, 2026
Determine Candidates to Recommend to School Committee by Date Noted	SCREENING COMMITTEE Candidates listed alphabetically	By February 8, 2026
First Agreement in Principle with Finalists and Verify Credentials	NESDEC	February 10-11, 2026
School Committee Workshop		Week of February 9, 2026
Announcement of Finalists to/by S.C.		February 11, 2026
Finalist Interviews and their optional "Day in the District"	SCHOOL COMMITTEE	February 23-March 6 2026
Second Agreement in Principle with Finalists	NESDEC	March 10, 2026
Reference checking, deliberation and selection of Superintendent	SCHOOL COMMITTEE	By March 16, 2026



New England School Development Council

28 Lord Road, Marlborough, MA 01752 ➤ Tel: 508-481-9444 ➤ www.nesdec.org

INTERVIEW TECHNIQUES A NESDEC ACTION GUIDE

Interviewing candidates should be one of the most enjoyable aspects of the entire recruiting process. This applies for both the interviewers and the person to be interviewed. This kind of atmosphere is basic to this monograph. Most of what we say here is equally appropriate for all levels of interviews. The only difference should be in the time spent on the interview and the intensity of the questioning.

PRELIMINARIES:

1. Everyone involved in doing the interview should be on time.
2. Choose a location that is pleasant and comfortable. If your state requires open interviews, try to anticipate the size of the audience so everyone is adequately seated.
3. All members of the Committee charged with interviewing should be present for every interview.
4. Allow ample time for the interview so no one feels hurried, but stick to the schedule. The chairperson should keep the interview on schedule.

THE QUESTIONS:

5. In advance of the interviews, the Committee should prepare questions that address previously agreed upon themes. While the questions may be tailored for each candidate, it usually works best to explore the same themes throughout the interview process. In this way you will have a basis for comparison.
6. Your first questions should be aimed at putting everyone at ease. A current topic of the day, the weather, or anything of common interest from the candidate's application form might serve as a good icebreaker.
7. Your questions should not duplicate information already available on the candidate's application. Although it is quite appropriate to let the candidate know you have studied the application by asking a question that relates to information included there. For example: "I read in your application that you have set up a communitywide Adult Education Council in your present position. I would be very interested in hearing how this works."
8. Don't try to "bait" a candidate with your questions. Remember, anyone good enough to be selected for an interview for your community is probably a pretty able person by all rights. Trying to place him or her in an embarrassing position may give an inaccurate picture of how the Committee operates and you may "turnoff" just the candidate you would most like

to attract. There are ample ways to test the candidate's ability to think and respond intelligently by judicious questions.

9. You should not ask questions dealing with a person's age, gender, sexual orientation, religion, race, marital status, health, disability status, ethnicity, or present salary.
10. Avoid questions that rely on specific details about your district. This presupposes knowledge of your school system which the candidate, particularly if this is the first interview, may not have.
11. Decide in advance which questions each person on the interviewing committee will ask and in what order.
12. It is appropriate to ask a followup question, to ask for clarification of a candidate's responses, or to ask an unplanned question that a candidate's response has suggested.
13. After each interview, you should allow time to write down your reactions. The most objective reactions will come when you respond directly following the interview. It is surprising how confusing it becomes if you leave this task for the end of the day or evening after you have talked to a number of candidates. NESDEC's "Interview Evaluation Form" provides a good basis for this rating.

CLOSING DETAILS:

In closing the interview, the candidate should be informed about next steps – the timetable the Committee hopes to follow, whether there will be additional interviews or visitations to the communities of finalists, etc.

SAMPLE SCALE FOR CONSIDERING A CANDIDATE'S RESPONSE TO INTERVIEW QUESTION

1	2	3	4	5
Unsatisfactory	Weak	Satisfactory	Good	Very Strong
Little or no details or little to no evidence of expertise/skill in this area or I do not feel that the response to this question indicates the level of skill or expertise in this area that is sought for this position	Few details or examples or some indicators of experience or expertise/skill in this area or I do not feel that the candidate's response to this question indicates the level of skill or expertise in this area that is sought for this position	Provided details, and examples or multiple indications of experience or skill in this area at a basic or satisfactory level or I feel that the candidate's response indicates a level of skill or expertise in this area that would enable them to move to the next round	Provided details and relevant examples or multiple indicators of experience or skill at a proficient level or I feel that the candidate's response provided clear evidence of skill, experience and expertise that is sought for this position	Multiple, relevant details and examples or multiple, relevant indicators of experience or expertise as a leader/innovator in this area or I feel that the candidate's response indicates a high level of skill and expertise that is sought for this position

TIME CHART FOR INTERVIEW QUESTIONS

NOTE: *These times represent the time available to both ask and answer the question*

# of questions	60 minute	45 minute	50 minute	90 minute
20	3	2.25	2.5	4.5
19	3.16	2.37	2.63	4.7
18	3.3	2.5	2.77	5
17	3.5	2.64	2.94	5.3
16	3.75	2.8	3.13	5.6
15	4	3	3.33	6
14	4.3	3.2	3.57	6.4
13	4.6	3.5	3.85	6.9
12	5	3.75	4.17	7.5
11	5.45	4	4.55	8.2
10	6	4.5	5	9
9	6.66	5	5.55	10
8	7.5	5.6	6.25	11.25
7	8.58	6.4	7.14	12.85
6	10	7.5	8.33	15
5	15	9	10	18

TIME CHART FOR INTERVIEW QUESTIONS

NOTE: *These times represent the time available to both ask and answer the question*

For example, if the interview lasts 60 minutes, and the committee asks 15 questions, (not ideal) there will be a total of 4 minutes to both ask and answer each question.

# of questions	60 minute	45 minute	50 minute	90 minute
20	3	2.25	2.5	4.5
19	3.16	2.37	2.63	4.7
18	3.3	2.5	2.77	5
17	3.5	2.64	2.94	5.3
16	3.75	2.8	3.13	5.6
15	4	3	3.33	6
14	4.3	3.2	3.57	6.4
13	4.6	3.5	3.85	6.9
12	5	3.75	4.17	7.5
11	5.45	4	4.55	8.2
10	6	4.5	5	9
9	6.66	5	5.55	10
8	7.5	5.6	6.25	11.25
7	8.58	6.4	7.14	12.85
6	10	7.5	8.33	15
5	15	9	10	18

TIME CHART FOR INTERVIEW QUESTIONS

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# of questions	60 minute	90 minute	45 minute	50 minute
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16	3.75	5.6	2.8	3.13
15	4	6	3	3.33
14	4.3	6.4	3.2	3.57
13	4.6	6.9	3.5	8.85
12	5	7.5	3.75	4.17
11	5.45	8.2	4	4.55
10	6	9	4.5	5
9	6.66	10	5	5.55
8	7.5	11.25	5.6	6.25
7	8.58	12.85	6.4	7.14
6	10	15	7.5	8.33
5	15	18	9	10

NESDEC Superintendent Search

Shrewsbury Sample Screening Interview Question

Opening & Motivation

- Why did you apply for the superintendent position?
- What is it about this district—its culture, priorities, and challenges—that appeals to you at this point in your career?
- How does your background prepare you for the work of a superintendent in this district?

Student-Centered Vision & Instructional Leadership

- How do you define a student-centered district, and how have you ensured that decisions are grounded in student needs and outcomes?
- What should graduates of a school district know and be able to do, and how would you measure progress toward that vision?
- Describe how you use data to improve teaching, learning, and equity across a district.
- How have you balanced innovation with maintaining successful instructional practices already in place?
- Describe a time when you led a district or school through a significant instructional improvement effort. What actions did you personally take, and what were the measurable results?
- Tell us about a time when data contradicted your initial assumptions about teaching and learning. How did you respond, and what actions followed?
- How do you balance academic rigor with student well-being?

Financial Leadership & Fiscal Stewardship

- Describe your experience developing and managing a district budget in alignment with strategic priorities.
- How do you communicate complex financial information to build understanding and trust with a school committee or board and the community?
- Describe your experience with budget overrides or other significant financial challenges. How did you build support?
- What are the biggest financial risks facing school districts today, and how do you plan proactively for them?
- Describe a time when you were responsible for developing or managing a complex budget. What trade-offs did you make, and how did those decisions impact students?

Communication, Listening & Trust-Building

- How do you ensure that staff, families, and community members feel heard, particularly when there are differing viewpoints?
- Describe a time when listening led you to change or refine a decision.
- How do you communicate during moments of conflict, crisis, or heightened public attention?
- Tell us about an initiative you led that required significant community engagement. What actions did you take, and how did you measure success?

Collaborative Leadership & Governance

- How do you establish a productive, transparent working relationship with a school committee or governing board?
- What does a “no surprises” relationship with a governing board look like in practice?
- How do you balance collaboration with the need to make difficult or unpopular decisions?
- Describe a time when you worked closely with a school committee or governing board during a period of challenge. How did you manage the relationship, and what was accomplished?

Political Awareness & Community Engagement

- How do you navigate the political environment of public education at the local, state, and federal levels?
- Describe how you have worked with municipal leaders or community partners to advance district goals.
- How do you respond to public or media criticism while maintaining trust and professionalism?

Management, Labor Relations & Organizational Leadership

- How do you build and sustain a strong leadership team across a district?
- Describe your experience working with employee groups and union leadership.
- How do you decide what to delegate and how do you hold people accountable?
- Tell us about a time you successfully addressed staff concerns or workplace conflict.
- Tell us about a situation in which you had to address underperformance among senior staff. What steps did you take, and what was the outcome?
- Tell us about a difficult labor or personnel issue you handled. What was your role, what actions did you take, and what did you learn from the experience?
- Describe a time when you led significant organizational or cultural change. What resistance did you encounter, and how did you address it?

Equity, Inclusion & Student Support Services

- How do you define equity in practice, and how have you worked to close achievement or opportunity gaps?
- Describe your experience overseeing special education and student support services.
- What data do you rely on to monitor student well-being, school climate, and safety?

- How do you ensure alignment between general education and special education programs?

Facilities & Capital Planning

- Describe your experience with school building projects, renovations, or expansions.
- How do you come up to speed quickly when leading a major facilities or capital planning initiative?
- How do you balance educational vision, fiscal responsibility, and community expectations during a facilities project?
- What role should the superintendent play in working with the school committee, municipal officials, and the community during a large-scale building project?

Change Management, Judgment & Resilience

- Tell us about a time you led through significant change. What did you learn?
- How do you respond when an initiative does not produce the intended results?
- Describe a crisis or safety-related situation you managed. What guided your decisions, and how did you communicate with students and families?

Year-One Priorities & Readiness

- If selected, what would be your priorities in your first 90 days?
- How do you approach learning the culture, strengths, and challenges of a new district?
- How do you balance listening and learning with the need to move forward on urgent priorities?
- How do you stay visible and connected to students across grade levels during your first year?

Shrewsbury **SAMPLE** Screening Committee Interview Schedule

Saturday, January 31, 2026

8:15-8:45-A.M.	Org. Meeting	
8:45 – 9:45	Interview	
9:45-10:00	Org. Mtg.	
10:00-11:00	Interview	
11:00-11:45	Org. mtg. and LUNCH	
11:45 -12:45 P.M.	Interview	
12:45-1:00	Org. Mtg.	
1:00-2:00	Interview	
2:00-2:15	Org. mtg.	
2:15-3:15	Interview	
3:15-3:45	Org. mtg. and BREAK	
3:45-4:45	Interview	

Saturday, February 7, 2026

8:30-8:45 A.M.	Org. Meeting	
8:45-9:45	Interview	
9:45-10:00	Org. Mtg.	
10:00-11:00	Interview	
11:00-11:15	Org mtg	
11:15-12:15 P.M	Interview	
12:15-1:00	Org. Mtg. and LUNCH	
1:00-2:00	Interview	
2:00-2:30	Org. Mtg. and BREAK	
2:30- 3:30 +	DELIBERATIONS	



New England School Development Council

28 Lord Road, Marlborough, MA 01752 ➤ Tel: 508-481-9444 ➤ www.nesdec.org

TO: Shrewsbury Public Schools Screening Committee Members
FROM: New England School Development Council (NESDEC)
DATE: XX
RE: Homework

The following guide is designed to assist Screening Committee members as they begin the preliminary screening of applicants.

Remember: The names, information and candidate applications are confidential, as is any discussion which takes place in executive (private) session. Please do not discuss any candidate outside of Screening Committee meetings (executive session).

READING THE APPLICATIONS

1. Please carefully read the ***Successful Candidate Profile***. It is in your packet or available on the District website. Keep this important Profile in mind and use it as a lens as you read through the application packets.
2. Ensure that you have access to a complete set of applications. Usually the applications are made available in a secure section of the NESDEC website. You will be provided the website address and password. During Committee discussions we will often refer to candidates by their number (for example, Candidate #12).
3. ***Carefully read each application.*** Take notes on where the candidate does or does not match the Candidate Profile, or about any areas you feel are areas of strength or need. Your notes will aid you in Screening Committee discussions. However, please be advised that your notes, under certain circumstances, can be considered public documents.
4. **Complete the "Interest Indicator" in your packet noting whether you are "definitely" interested in interviewing a candidate, "somewhat" interested in interviewing a candidate, or "not" interested in interviewing a candidate.** Bring this completed sheet to our next Screening Committee meeting. This sheet, along with your supporting notes, will be the start of our discussions. Please keep in mind that the Interest Indicator sheet is a confidential document.

PREPARING YOUR INTERVIEW QUESTION(S)

5. Choose a theme for your interview question – you may want to choose a theme from the bulleted items in the Successful Candidate Profile, or you may have an area of particular interest to you.
6. Read over the sample interview questions that were included in your NESDEC orientation packet. Write a draft question; for example, you may use one sample question or a combination of two or more samples – or create your own question.
7. Bring your draft question to our next Screening Committee meeting.

CHECK YOUR CALENDAR

8. At an upcoming meeting, we will confirm the interview dates.

If you have any questions about the preliminary screening process, feel free to contact your consultants.

Thank you.

Shrewsbury Public Schools Superintendent Candidate Profile

Introduction

During the first two weeks of January 2026, the Shrewsbury School Committee conducted a Community Needs Assessment.

Participants provided their responses to two prompts:

- What are the qualities, characteristics, skills, knowledge, and experiences you desire in a new Superintendent of Schools?
- What do you see as the pressing tasks and challenges ahead for him or her in year one?

The Shrewsbury School Committee reviewed and analyzed the community's input and then added its own perspective to create the Shrewsbury Public Schools' **Superintendent Candidate Profile**. The Superintendent Candidate Profile is designed to guide the Superintendent Search interview and selection process.

The Shrewsbury School Committee wishes to thank and commend all those who participated in the needs assessment process.

Superintendent Candidate Profile

The community of Shrewsbury seeks a highly qualified Superintendent and expects a high level of competence across all aspects of the position. To ensure the selected Superintendent is a particular match for Shrewsbury's needs and goals, **preference will be given to the educational leader who demonstrates a significant depth of skill and knowledge in the following areas:**

Student-Centered Vision & Instructional Leadership

The Superintendent must be a strong educational leader who places students at the center of all decisions with a focus on students' academic achievement and social-emotional well-being. This is the core of the role. The Superintendent must consistently use data to study the system and areas such as equity and closing achievement and opportunity gaps. The Superintendent must ensure safe, supportive environments for all students and staff, and understand the real-world complexities of teaching, learning, instructional leadership, technology and AI integration, and curriculum in 2026.

Financial Leadership & Fiscal Stewardship

Strong financial leadership is essential. The Superintendent must understand school finance, budgeting, and long-term financial planning, including preparation for a future Proposition 2½ override, if needed. Clear, transparent communication about finances and careful stewardship of taxpayer funds are critical. The Superintendent

must balance educational priorities with responsible spending and plan proactively for enrollment growth, overcrowding, and facility needs.

Communication, Listening & Trust-Building

Clear, consistent, and transparent communication is foundational to success. The Superintendent must listen actively, value diverse perspectives, follow through on commitments, and communicate calmly and effectively, especially during challenging situations. Visible leadership, timely updates, and openness are essential to building trust with staff, families, students, and the broader community.

Collaborative Leadership & Relationship Management

Success depends on strong working relationships with the School Committee, staff, unions, municipal leaders, and community partners. The Superintendent is expected to lead collaboratively, foster buy-in, trust educators' professional expertise, and promote a positive school culture. Effective relationship management and follow-through are essential to sustaining district effectiveness.

Community Engagement

The Superintendent must be adept at navigating the Massachusetts educational landscape. This includes engaging the community, responding thoughtfully to public concerns, and working effectively with municipal officials, including the Select Board and Town Manager. The Superintendent should help preserve and strengthen Shrewsbury's reputation for high-quality schools, which supports the town's economy and quality of life.

Governance, Transparency & Ethics

Ethical leadership, integrity, and transparency are non-negotiable. The Superintendent is expected to maintain a 'no surprises' relationship with the School Committee and communicate openly and honestly with governing bodies. Clear, consistent processes for decision-making, accountability, and the handling of sensitive matters are essential.

Management, Delegation & Organizational Capacity

Effective delegation, mentoring, succession planning, and organizational oversight are critical to sustaining district effectiveness. The Superintendent should respect successful systems while identifying efficiencies and supporting continuous improvement. Thoughtful alignment of initiatives, attention to organizational capacity, and avoidance of initiative overload are important to supporting staff well-being and effectiveness.

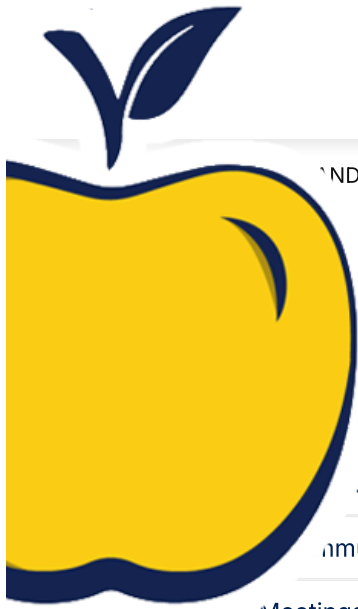
Experience, Judgment & Personal Resilience

Experience in district-level leadership, sound judgment, calmness under pressure, and personal resilience are important enablers of success. The Superintendent role requires stamina, reflection, and a realistic understanding of the complexity, visibility, and demands of leading a public school district.



Shrewsbury Public Schools Superintendent Search Screening Committee

Ken Almeida	Director of World Languages
Erin Boucher	Chair, School Committee
Amy Clouter	Assistant Superintendent for Curriculum, Instruction, & Assessment
Ashish Cowlagi	Parent, High School Level
Kelly Finneran	Grade 4 Teacher, Coolidge School
Sandra Fryc	School Committee
Brian L'Heureux	Information Technology Project Manager
Christina Manos	Director of English Language Education
Amara Mahmood	Parent, Middle School Level
Beth McCollum	Executive Assistant to the Superintendent
Shawna Powers	Director of Instructional Technology & Media Services
Kelly Seddiki	Executive Director of Human Resources
Nicole Torres	Parent, Preschool/Elementary Level



ANDOVER PUBLIC SCHOOLS // SCHOOL COMMITTEE // APS SUPERINTENDENT SEARCH

ANDOVER PUBLIC SCHOOLS Massachusetts

Community Engagement Meetings - Agendas, Presentations, Videos, and Minutes

Informal Forums for 2025-26 School Year

Policy Manual

Budget Information

Superintendent's Office

Subcommittees & Work Groups ▼

Superintendent & School Committee Protocols

West Elementary & Shawsheen Preschool Building Project ▼

Andover High School Improvement Project

APS Superintendent Search

The School Committee is pleased to announce that **Keith Taverna** has been appointed as the next superintendent of Andover Public Schools. [Mr. Taverna](#) brings more than 17 years of experience in public education and a demonstrated commitment to student achievement and community engagement.

Mr. Taverna had successfully led the district as interim superintendent since February, following the departure of Dr. Magda Parvey. A key member of the APS leadership team, Mr. Taverna joined APS in 2022 as the assistant superintendent of Finance and Administration.



Mr. Taverna holds a master's degree in Business Administration from Clark University and is licensed as a Superintendent/Assistant Superintendent by the Massachusetts Department of Elementary and Secondary Education.



His appointment follows a comprehensive and inclusive search process that began in early 2026 and attracted 36 applicants. The process included extensive community outreach through focus groups, informal forums, surveys, and opportunities for stakeholders to meet with finalists. This engagement ensured the selected candidate reflects the priorities and values of the Andover Public Schools community.

Following tonight's vote, the School Committee will begin contract negotiations with Mr. Taverna. His anticipated start date as the permanent superintendent is July 1, 2026.

The School Committee extends its sincere appreciation to the APS community and the members of the Screening Committee whose time, insight, and dedication were instrumental in shaping a thoughtful and successful search process.

APS Superintendent Search Finalists

Brad Crozier - School Committee Superin
Andover Public Schools

Keith Taverna - School Committee Superi
Andover Public Schools



Watch on



Watch on



[Brad Crozier Resume](#)



[Keith Taverna Resume](#)

Superintendent Search Timeline

January - March 2026:

- **January 12th:** Dr. Parvey announced her [resignation from the district](#)
- **January 15th:** School Committee meets in Executive Session and Open Session and [appoints Assistant Superintendent of Finance and Administration Keith Taverna as Interim Superintendent from March 2 -](#)

June 30, 2026.

- **January 30th:** [School Committee meets with Town and Schools Purchasing Agent](#), Theresa Peznola, to discuss and vote on submitting a Request for Proposals (RFP) for a Search Firm
- **February 12/February 26th:** RFP opens/closes
- **March 10th:** School Committee [votes unanimously to select New England School Development Council \(NESDEC\)](#) as firm to conduct the APS superintendent search
- **March 26th:** NESDEC attends their first School Committee meeting to review timeline, screening committee composition, and process
- **March 30th:** NESDEC advertises position & recruitment process through **April 29, 2026**
- **March 31st - April 10th:** Online survey for APS staff, students, families and Andover community

April 2026

- **Week of April 13th:** NESDEC conducts focus groups/interviews and develops candidate profile
- **Informal Forums - April 11th & 14th**
- **April 24th:** NESDEC presents [candidate profile](#) for School Committee approval

May 2026

- **May 18th:** APS Screening Committee recommends finalist candidates to School Committee
- **May 21st:** Finalists announced

June 2026

- **June 8th:** "Day in the District" visit with Mr. Crozier
- **June 9th:** "Day in the District" visit with Mr. Taverna
- **June 11th:** Finalist Interviews
- **June 13th:** School Committee Informal Forum
- **June 15th:** School Committee Meeting - Superintendent Selection

Background

In January 2026, the Andover School Committee began discussions regarding a comprehensive search process for a permanent superintendent, with the goal of appointing a new superintendent by July 1, 2026. This process will include extensive feedback and engagement with the community.

In March, following a "Request for Proposal" (RFP) process, the Committee voted to approve the New England School Development Council ([NESDEC](#)) to support the district in its executive search process. For over seven decades, NESDEC has assisted school boards and committees in identifying and selecting outstanding leaders who align with the community's vision and values.

The School Committee's goal is for the profile of a successful candidate to be determined with input from the Andover community, including parents/guardians, students, educators, administrators, staff and the community at large.

Superintendent Search Screening Committee**Documents of Interest**

School Committee Members	Shauna Murray, Jake Tamarkin
---------------------------------	------------------------------

Community Members	Glen Stump, Beth Dunne
Principals	Matthew Fox (West Middle), Sarah Leveque (High Plain)
Staff/Elementary	Tricia Xavier
Staff/Middle	Emily Thompson
Staff/High School	Lindsey L'Ecuyer
Instructional Assistant	Karen Torres
APS Central Office	Nicole Kieser
APS Human Resources	George Puddister
Town of Andover	Brittany Lavoie

- [NESDEC - Job Description and Application](#)
- [School Committee Search Update](#) - April 16, 2026
- [APS Candidate Search Profile](#) - April 27, 2026



Schools

Andover Public Schools
 30 Whittier Court
 Andover, MA 01810
 Phone: (978) 247-7000

Andover Public Schools

Andover High School

Doherty Middle School

West Middle School

Wood Hill Middle School

Bancroft Elementary School

High Plain Elementary School

Sanborn Elementary School

South Elementary School

West Elementary School

Shawsheen Preschool

Employment

Community

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Permanent Superintendent Search: Update #1

August 30, 2023 / in District Newsletter, Superintendent Search / by joyced

Dear Weston Community,

On behalf of the Weston School Committee, welcome back to what will surely be an exciting and momentous school year. Over the summer, we have been busy welcoming our new Interim Superintendent, Dr. Karen Zaleski, and new Assistant Superintendent of Finance and Operations, Steven Nembirkow, to Weston. In addition, since the late spring we have been planning for the upcoming year, including laying out the process for the search and selection of our permanent superintendent.

As was done during the Interim Superintendent search, the School Committee will provide periodic updates to the community to share our progress and keep everyone informed by email and by posting to the School Committee's section of the [District's website](#). This first update is intended to provide an overview of the process that was approved by the School Committee at our August 21st meeting.

As background, in the Spring of 2023, when we selected Dr. Zaleski as our interim superintendent, the School Committee stated two things. First, we were looking for an interim that had the potential to lead our district on a permanent basis. Second, the School Committee would be conducting a full search in the Fall for a permanent superintendent. That search would have



applying for an interim position. During the interim superintendent search the School Committee reached out to the community, and the community certainly responded! We received tremendous feedback through our online survey, numerous focus groups (including elementary/secondary parents, administrators, teachers, and parent-led organizations), written comments, and questionnaires from the Meet the Candidates zoom event. While all of this collected information will be used, we will have additional ways for the community to get involved.

Screening & Preliminary Interview Subcommittees

The first avenue for community input and involvement is with the Application Screening Subcommittee and Preliminary Interview Subcommittee. The School Committee is seeking a broad, representative group of community members, including parents, Westonians, administrators, educators, and staff to review and assess applications and select candidates to move forward to the semi-finalist interview stage. There will be a separate, smaller Preliminary Interview Committee that will conduct semi-finalist interviews and forward finalists onto the entire School Committee for the public portion of the process. The work of these two committees will be confidential to help us attract the broadest and most qualified pool of candidates, as is customary. As can be expected, potential candidates may not want to notify their current districts that they are applying and seeking new opportunities until they make it to the finalist stage and decide that they want to make the leap to the next round.

We encourage community members who are interested in serving on either the Screening Subcommittee or



this announcement to those who may be interested who may not be on the school's email list – as all Weston-connected community members are encouraged to submit their interest to serve!

Process Overview

These are some of the key activities and milestones of the Superintendent Search process.

- **August 1st & 2nd:** School Committee held preliminary discussions on search process options and reviewed a draft of the superintendent job description to be published widely, and for a longer duration than the interim job opening.
- **August 21st:** School Committee voted to:
 - Finalize the Superintendent Job Description and posting timelines.
 - Utilize MASC (Massachusetts Association of School Committees) staff to provide technical assistance during the search process. MASC has assisted in innumerable superintendent searches and has deep experience in this area. For more information on their experience see [here](#).
 - Utilize subcommittees to screen applicants and conduct preliminary interviews.
- **September 5th – October 6th:** Job posting open and broadly publicized with support from MASC. Applications are submitted directly to MASC for collection and will be returned to the screening subcommittee in confidence.
- **Now through September 16th:** Collect interest from the community to join the Application



-
- **September 18th:** Screening and Preliminary Interview Subcommittee members are announced at the School Committee meeting.
 - **October 10th-20th:** Screening subcommittee members receive the applications, standard assessment rubric, and then meet in person for a confidential executive session to deliberate and select semi-finalists to be forwarded to the Preliminary Interview Subcommittee.
 - **October 26 & 27th:** Preliminary Interview Subcommittee conducts semi-finalist interviews in confidential executive session and identifies candidates to recommend for finalist status.
 - **October 27-30th:** Candidates selected as finalist recommendations are notified and agree to be publicly named as potential finalists.
 - **October 30th:** School Committee receives finalist candidates.
 - **November 20-December 1st:** Finalist interviews (open to the public), site visits, and opportunities for the community to engage with candidates. Specific community events will be determined and announced later, with the potential for scheduling changes as needed and determined by the School Committee.
 - **December 4th:** School Committee votes to select Permanent Superintendent.
 - **Mid-December – January 2024:** School Committee negotiates and signs a multiyear contract with an anticipated start date of July 1, 2024.

Interim Role during this process



she has since July 1, 2025 to ensure that we continue to provide a world-class education for our students. As she stated during the interim interview process, she is interested in being our permanent superintendent and is anticipated to apply. There are likely to be awkward moments, but she, the broader administration, and School Committee are all committed to making sure the important work of running and improving our district continues.

At the end of this process, Dr. Zaleski may be the candidate chosen as the permanent superintendent, or another candidate may prevail. We are dedicated to treating each applicant fairly, giving due regard to their credentials, experience, and fit for what Weston needs at this moment. Regardless of the outcome, a robust interview and selection process will give whomever is selected more credibility and strength in leading our District, as well as ensuring that we have the best possible long term superintendent for Weston.

Closing Thoughts

This process will be a great deal of work, but selecting a permanent leader is worth the effort. We hope the community will support us by remaining positive with our candidates and show all who express interest the best of Weston. Please withhold judgment and the submission of opinions until after the finalists are announced publicly. A process that is supportive, fair, and positive for all candidates, including those not chosen, is important so that top-quality candidates continue to consider Weston now and in the future.



PUBLIC SCHOOLS.

Until next time,

Ken Newberg and Maija Cirulis-Gooch

Chair and Vice Chair

Weston School Committee

Edit: This letter previously listed December 6th as the date the School Committee will vote on the Permanent Superintendent. This was corrected to December 4th on September 6, 2023.

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**Sudbury Public Schools
School Committee Meeting**

Date: July 6, 2026

Agenda Item: 6c. Budget Tiered Initiatives Overview

Recommendation:

Background / Preparation Information:

The budget is such a critically important part of our role so we are beginning the process as early as possible and will discuss the budget at meetings over the Summer months and into the Fall. Please read through the overview document paying particular attention to Section 3 of the document. It outlines a proposed timeline of events. We will focus on step one of the timeline in this meeting. Please come to the meeting prepared to discuss your ideas for budget initiatives. We will not be voting on any initiatives at this meeting. Subsequent meetings will focus on steps 2-4 and step 5 if needed.

Attachments:

7.6.26 SPS Budget Tiered Initiatives .docx

Action:

Report:

Discussion:

XX

FY28 Budget Preparation

Launching the Tiered Initiative Process

1. Why the School Committee evaluates tiered initiatives

The School Committee has a responsibility to approve the district budget. That responsibility is more than confirming that revenues and expenses balance. The operating budget is one of the primary ways the Committee translates district values, goals, and student needs into action.

In practice, a goal that requires staffing, materials, services, professional learning, technology, or program time generally needs a budget line or funding plan. Without that connection, even a strongly supported priority may not be implemented in a responsible or sustainable way.

Evaluating tiered initiatives early does not mean building a wish list untethered to fiscal reality. It means creating a disciplined, transparent process to ask what problem an initiative would solve, what student outcome it is intended to improve, what it would cost, whether it can be piloted or phased, and what trade-offs would be required.

Responsible budget strategy includes asking what is inside level service

A level-service budget may maintain the current service model, but the Committee can still ask whether the current mix of services, staffing, curriculum, professional development, and supports is aligned with current student needs. In a constrained fiscal environment, improvement may require new investment, reallocation, phasing, or a decision not to move forward after analysis.

2. Key budget terms for the public discussion

Term	Plain-language meaning
Level-service budget	The estimated cost to continue the current educational program and service model, adjusted for known changes such as enrollment, student needs, contractual obligations, inflationary costs, transportation, utilities, mandated services, and other cost drivers. Level service is not the same as a flat dollar budget.
Base budget	The budget needed to sustain current services and comply with legal, contractual, and operational obligations.
Tiered initiative	A proposed restoration, investment, or enhancement considered separately from the base budget. Tiering helps distinguish what is required to maintain current services from what the district may want to add, restore, pilot, or study.
Pilot or phased initiative	A way to test or implement an idea over time, such as beginning with one grade, one school, one year, or a smaller staffing/materials model before considering broader implementation.

3. Proposed process for School Committee tiered initiatives

This work is beginning in the summer, so the Committee has more time for public discussion, alignment with district goals, and consultation with Administration before the FY28 budget is finalized.

Process Step	Description
Step 1: Brainstorm	Discuss members' ideas for budget initiatives. Ideas do not need cost estimates or implementation plans at this stage. A Google Form will be distributed after the initial discussion to collect all budget initiatives that members would like to include in further discussions.
Step 2: Organize and prioritize	The Committee reviews submissions, groups similar ideas, identifies common themes, and discusses alignment with School Committee goals and district values.
Step 3: Consult with Administration	Administration brings input from principals, educators, student services, curriculum leaders, operations, and finance. Administration evaluates educational impact, feasibility, staffing, timing, legal/compliance issues, and cost.
Step 4: Refine and phase	For stronger ideas, the Committee and Administration consider whether an initiative could be piloted, phased, funded one time, or built over multiple budget cycles.
Step 5: Public budget discussion	Narrowed initiatives are discussed as part of the FY28 budget process alongside level-service needs, possible reductions, and available revenue.

4. FY27 context and FY28 fiscal landscape

In FY27, SPS was able to present a budget maintaining current services while operating within final Town budget guidance. It should also be understood as different from a budget that fully funds new or expanded initiatives.

The FY27 Budget Book identified cost drivers and targeted reductions/adjustments needed to meet guidance. Examples included contractual salary obligations, enrollment-driven classroom positions, special education contracted services, software subscription pressures, and a middle school math staffing need. Adjustments included reductions in teacher assistant positions and an EL teaching position due to enrollment and student needs, reductions in software subscriptions, and elimination of the SMILE/ Explore program after a one year bridge program.

5. Budget reductions may also need to be discussed

This memo is focused on identifying tiered initiatives. At the same time, the Committee should be realistic that the FY28 process may require difficult conversations about reductions if projected expenses exceed available recurring revenue.

Potential reduction areas should be discussed carefully and publicly, with Administration and legal guidance where needed. Examples of areas that may need to be understood include:

- Class size: whether the district would need to operate outside current guidelines, and what that would mean for instruction, supervision, and student support.
- Specials and enrichment: possible impacts to art, music, health, physical education, library/media, technology, or other enrichment areas, including curriculum and student learning time considerations.
- Professional development and curriculum work: whether implementation support, teacher leadership, curriculum review, or instructional coaching would be delayed or reduced.
- Student support services: which services are legally required, which are local program choices, and what reductions would mean for students with disabilities, English Learners, high-needs students, and students needing academic, behavioral, or social-emotional supports.
- Technology and instructional materials: whether subscriptions, devices, classroom equipment, or assessment tools would be reduced or replaced more slowly.

**Sudbury Public Schools
School Committee Meeting**

Date: July 6, 2026

Agenda Item: 6d. Discussion on holding community Listening Session on Jewish student experiences, religious inclusion and belonging across Faith Communities

Recommendation: Motion to hold Listening Session with (member name) and (member name) at Temple Beth-El on a date in late August, with specifics to be decided upon in a subsequent meeting.

Background / Preparation Information: We have heard concerns from individuals of the Jewish community over the past year and we are committed to addressing them. I had a conversation with Rabbi Josh from Temple Beth-El about these concerns. During the conversation he offered to host a Listening Session centered on concerns of the Jewish families in Sudbury. Anyone can attend the Listening Session and any topic can be discussed. My hope is to hear more about the experiences of the Jewish students in our schools so we can understand possible avenues of support. I envision this as the first of many informational gathering modalities as we explore ways the School Community can partner with District leadership to address their concerns. In our meeting, we will determine which two members will attend the Listening Session and potential dates for the session.

Attachments:

Action: XX **Report:** **Discussion:** XX

**Sudbury Public Schools
School Committee Meeting**

Date: July 6, 2026

Agenda Item: 6e. Transportation RFP update

Recommendation:

Motion to authorize the Chair of the SPS School Committee to communicate with the Chair of the LS School Committee regarding the Transportation RFP.

Background / Preparation Information:

The current Transportation RFP, which is shared with LSRHS, ends June 30, 2027 and a new RFP must be sent out to bid this year. The LS School Committee, in concert with their Procurement Officer, has already begun drafting an RFP. LS has also consulted with Eric Simms, the Sudbury Sustainability Coordinator to discuss possible sustainability practices in the RFP. LS has also pursued funding from MassCEC Bus Advisory Services Program to investigate these practices. The packet contains an overview document with background on MassCEC as well as a draft agreement and last year's contract.

Please review the documents and note that the overview document includes some ideas and suggestions of what SPS might want to include in the final RFP. Please come to the meeting having determined if these items should be included/excluded and/or brainstorm other ideas you would want included. The final list will be shared with the LS School Committee.

Attachments:

7.6.26 SPS Transportation.docx
School Bus Contract FY23-FY25_Signed.pdf
ACT School Bus Advisory Services Letter of Commitment

Action: XX **Report:** **Discussion:** XX

Transportation RFP Planning

MassCEC School Bus Advisory Services Opportunity

Background and Purpose

Sudbury Public Schools participates in a joint transportation contract with Lincoln-Sudbury Regional High School for student bus transportation services. The current contract expires on June 30, 2027, at the conclusion of the 2026-2027 school year.

The transportation RFP is currently being prepared by LS. Because the contract serves both districts, SPS is responsible for identifying SPS-specific transportation needs and questions before the RFP is finalized and issued.

Historically, the District has reported that transportation RFPs may receive limited vendor responses. Even in a limited market, it remains important for the RFP to clearly identify required services, optional services, service standards, pricing structures, and the information needed for the District to evaluate transportation options.

As a next step, Committee members will be asked to provide feedback on whether there are additional transportation needs or questions that should be considered as part of the RFP process. This feedback is not limited to electric buses. It may include any transportation-related issue that could affect service expectations, contract language, pricing, routing, student access, or future planning.

SPS Transportation Considerations

- **METCO late bus / extracurricular transportation.** The District currently has grant-funded support for certain transportation connected to METCO student participation in after-school or extracurricular activities. If grant funding is not available in future years, the District may need to understand whether and how late transportation could be provided through the transportation contract. The administration should clarify whether the RFP should include language or pricing for this option, either as part of the base contract or as an optional/additional service.
- **After-school care transportation.** During a prior administrative report, Principal Jeff Mela identified a transportation-related need connected to late busses. The Committee has requested additional information regarding the nature of that need, whether it affects bus routing or service hours, and whether it should be reflected in the RFP.
- **Separate AM and PM route demand.** The administration collected information during bus registration regarding family interest in separate AM and PM transportation options. The Committee should receive a summary of that information, including whether there is sufficient demand to warrant any change to the current model and whether any such change would affect routing, bus counts, driver needs, or pricing.
- **Transportation to community programming locations.** The Committee has also asked whether there is interest in or need for transportation to locations such as Fairbank Center, the library, or Parks and Recreation programming. The administration should clarify whether such service is feasible, whether there is demonstrated demand, and whether it would be appropriate to include in the RFP as a required or optional service.

Electric Bus Considerations

The Committee has previously discussed whether the upcoming transportation RFP should include an option to evaluate electric school buses. This discussion has occurred in the context of long-term transportation planning, environmental considerations, and potential changes in school transportation technology.

At this stage, the Committee is not being asked to decide whether Sudbury Public Schools should convert its bus fleet to electric buses. Rather, the question is whether the RFP should be structured to provide information that would allow SPS and LS to compare conventional transportation pricing with one or more electric bus options, such as a limited pilot or phased approach.

The committee will be asked to provide any questions that it has related to electric bus pilots. Examples may include:

- What would be the cost difference between standard transportation service and a limited electric bus option?
- Would electric buses be vendor-owned, leased, or district-owned?
- What charging infrastructure would be required, where would charging occur, and who would own, maintain, insure, and pay for the equipment and electricity?
- What utility upgrades, permits, approvals, site work, or implementation timelines would be required?
- Would electric buses be appropriate for all routes or only certain routes, and how would range and reliability be affected by winter conditions?
- What backup vehicles, service plans, maintenance arrangements, and vendor performance guarantees would apply?
- What are the expected environmental benefits, lifecycle considerations, and battery end-of-life plans?

- What grants, incentives, or outside funding opportunities may be available?
- How would any electric bus option affect the term, cost, risk, and flexibility of the transportation contract?

What is the MassCEC School Bus Advisory Services Program

The Massachusetts Clean Energy Center, or MassCEC, offers a School Bus Advisory Services Program that provides no-cost fleet electrification planning support to Massachusetts public school districts. MassCEC states that the program is intended to help districts address barriers to school bus electrification, including upfront costs, coordination with third-party transportation providers, technical knowledge gaps, and resource constraints. The program provides advisory services only; it does not provide funding to purchase electric school buses.

According to MassCEC, advisory services may include vehicle and charging infrastructure analysis, feasibility designs, financial models, support for preparing for future funding opportunities, vehicle and charging station procurement plans, and educational materials. MassCEC's consultant team is led by VEIC, with PowerOptions and Energetics identified as partners.

MassCEC states that participating districts receive a Final Fleet Electrification Plan. The plan may include next steps for funding opportunities, a timeline of required approvals, stakeholder roles, identification of vehicles that could be electrified, suggested timing for procurement decisions, electric vehicle supply equipment recommendations, cost information, and post-deployment operational considerations such as training, charging schedules, and maintenance.

Applications for the Advisory Services Program are accepted on a rolling basis, and MassCEC lists the final fleet electrification plan and presentation as expected six months from selection. MassCEC identifies district responsibilities including participation in kickoff, monthly, and quarterly meetings; providing baseline fleet data such as fleet size, routes, schedules, fuel types, and costs; and helping engage relevant stakeholders such as the utility, school officials, and third-party fleet operators.

Susan Bottan, Director of Finance and Operations, and Eric Simms, Sudbury's Sustainability Coordinator, have been instrumental in identifying and pursuing the MassCEC advisory opportunity. SPS has been informed that Sudbury has been selected for this MassCEC advisory opportunity, pending completion of any required participation documents and coordination with LS. The Committee has also been informed that the estimated value of the advisory services is approximately \$50,000, that the resulting electrification plan would be non-binding, and that participation would not commit the schools to any specific timeline or decision regarding school bus electrification.

Participation would require the designation of a primary contact person or project manager to coordinate with the consultant team, MassCEC, and other participants. The Committee has been informed that the anticipated local time commitment is approximately 25 to 40 total hours over the course of the project, which is expected to take approximately six months.

Eric Simms, Sudbury's Sustainability Coordinator has indicated that, if both school committees agree, he may be willing to serve as the project manager for the MassCEC advisory process. This could provide a single coordinating point for advisory work across SPS and LS, while still allowing each district to identify its own needs and decision points.

Source Document: [MassCEC School Bus: Advisory Services Program](#)

<https://www.masscec.com/program/school-bus-advisory-services-program>

APPENDIX A - TRANSPORTATION CONTRACT SUDBURY PUBLIC SCHOOLS AND LINCOLN SUDBURY REGIONAL HIGH SCHOOL

THIS AGREEMENT is made this 24th day of January in the year 2022 by and between the Sudbury Public Schools, having a usual place of business of 40 Fairbank Road, Sudbury, Massachusetts and the Lincoln Sudbury Regional High School, duly organized under the laws of Massachusetts and having a usual place of business at 390 Lincoln Road, Sudbury, Massachusetts, hereinafter referred to as the “Districts”, and First Student, Inc., having a usual place of business at 352 Concord Rd, Sudbury, Massachusetts, hereinafter referred to as the “Contractor.”

WITNESSETH, as follows, that the Contractor agrees to furnish regular transportation and deliver for the Sudbury Public Schools and the Lincoln Sudbury Regional High School, pupils attending the schools from such places and at such times and for such considerations as is set forth in the Transportation Specifications dated November 15, 2021 (Invitation to Bid, Bid Forms, and other specifications) which are annexed hereto and made a part hereof, and are to be applicable for the duration of the contract, except as they may later be amended by mutual agreement.

This Agreement shall be for the period commencing July 1, 2022 through June 30, 2025. The term may be extended for up to two additional years as specified in the Invitation for Bid and at the prices bid by the Contractor.

The Districts’ agree to pay the Contractor said consideration in monthly payments, as per the specification, for services rendered under the Contract based upon the yearly contract price per route, September through June, upon satisfactory performance of said service on all days when schools are in session and transportation is furnished.

The Contractor agrees to comply with all the Massachusetts statutes applicable to the transportation of school children and any failure to comply with such statutes shall be deemed to be a breach of this Contract.

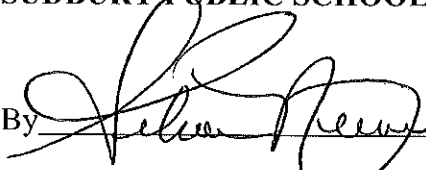
The said Contractor expressly warrants that said vehicles used by it in the performance of this Contract shall be fit for the purpose for which they are intended and shall be free from all defects and that the drivers operating these vehicles shall be duly licensed and capable of performing the duties required herein.

Each and every provision of law and clause required by law to be inserted in the Contract shall be deemed to be inserted herein and the Contract shall be read and enforced as though it were included herein and if through mistake or otherwise any such provision is not inserted, or it is not correctly inserted, then upon application of either party the Contract shall forthwith be physically amended to make such insertion.

This Contract shall not be assigned nor any part thereof be sublet without the written consent of the Sudbury Public Schools and the Lincoln Sudbury Regional High School, acting by and through their School Committees.

IN WITNESSETH WHEREOF, the parties hereto have executed this Agreement on this day and year first above written.

SUDBURY PUBLIC SCHOOLS

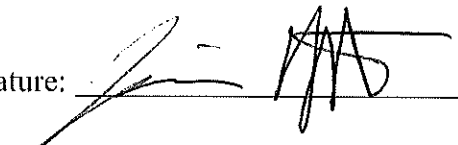
By  3/18/22
Silvia Nerssessian, Chair

LINCOLN SUDBURY REGIONAL SCHOOL DISTRICT

By  4/13/22
Cara Endyke Doran, Chair

CONTRACTOR:

Company Name: First Student, Inc.

Signature: 

Print Name: Jessica Quint

Title: Area General Manager

BID EVALUATION FORM- REGULAR TRANSPORTATION

YEAR 1 - 2022 - 2023

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180	\$499.00	\$0.00
Coordinated 2 – Way Bus	25	180	\$446.54	\$2,009,430.00
Uncoordinated 1 – Way Bus	2	180	\$435.42	\$156,751.20
Lincoln Only	3	180	\$435.42	\$235,126.80

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$71.19	\$21,357.00

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$67,012.75

Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 1:	\$2,489,677.75
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BID EVALUATION FORM- REGULAR TRANSPORTATION

YEAR 2 - 2023 - 2024

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180	\$513.97	\$0.00
Coordinated 2 – Way Bus	25	180	\$459.94	\$2,069,730.00
Uncoordinated 1 – Way Bus	2	180	\$448.48	\$161,452.80
Lincoln Only	3	180	\$448.48	\$242,179.20

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$73.33	\$21,999.00

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$69,024.38

Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 2:	\$2,564,385.38
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BID EVALUATION FORM- REGULAR TRANSPORTATION

YEAR 3 - 2024 - 2025

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180	\$529.39	\$0.00
Coordinated 2 – Way Bus	25	180	\$473.74	\$2,131,830.00
Uncoordinated 1 – Way Bus	2	180	\$461.93	\$166,294.80
Lincoln Only	3	180	\$461.93	\$249,442.20

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$75.53	\$22,659.00

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$71,096.38

Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 3:	\$2,641,322.38
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BID EVALUATION FORM – REGULAR TRANSPORTATION

YEAR 4 - 2025 - 2026

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180	\$547.92	\$0.00
Coordinated 2 – Way Bus	25	180	\$490.32	\$2,206,440.00
Uncoordinated 1 – Way Bus	2	180	\$478.10	\$172,116.00
Lincoln Only	3	180	\$478.10	\$258,174.00

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$78.17	\$23,451.00

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$73,584.00

Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 4:	\$2,733,765.00
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BID EVALUATION FORM – REGULAR TRANSPORTATION

YEAR 5 - 2026 - 2027

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180	\$567.10	\$0.00
Coordinated 2 – Way Bus	25	180	\$507.48	\$2,283,660.00
Uncoordinated 1 – Way Bus	2	180	\$494.83	\$178,138.80
Lincoln Only	3	180	\$494.83	\$267,208.20

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$80.91	\$24,273.00

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$76,160.00

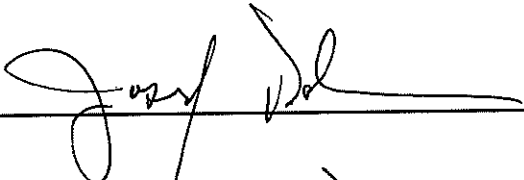
Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 5:	\$2,829,440.00
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TOTAL COST FOR REGULAR TRANSPORTATION

Total Annual Cost Year 1:	\$2,489,677.75
Total Annual Cost Year 2:	\$2,564,385.38
Total Annual Cost Year 3:	\$2,641,322.38
Total Annual Cost Year 4:	\$2,733,765.00
Total Annual Cost Year 5:	\$2,829,440.00

Total Contract Value - Regular Transportation Years 1 – 5:	\$13,258,590.50
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SIGNATURE:  _____

PRINTED NAME: JOSEPH DOHERTY _____

COMPANY NAME: FIRST STUDENT, Inc. _____

DATE: December 2, 2021 _____

BID EVALUATION FORM – LATE BUS AND ATHLETIC TRIPS

YEAR 1 - 2022 - 2023

Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$71.19	\$21,357.00
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$67,012.75

YEAR 2 - 2023 - 2024

Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$73.33	\$21,999.00
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$69,024.38

YEAR 3 - 2024 - 2025

Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$75.53	\$22,659.00
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$71,096.38

YEAR 4 - 2025 - 2026

Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$78.17	\$23,451.00
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$73,584.00

YEAR 5 - 2026 - 2027

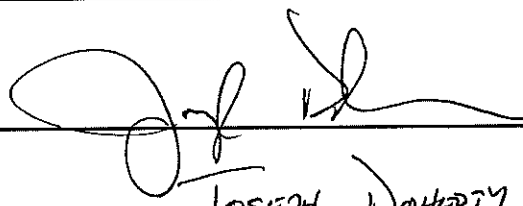
Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150	\$80.91	\$24,273.00
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				\$76,160.00

BID EVALUATION FORM – LATE BUS AND ATHLETIC TRIPS

Total Annual Cost Year 1:	\$88,369.75
Total Annual Cost Year 2:	\$91,023.38
Total Annual Cost Year 3:	\$93,755.38
Total Annual Cost Year 4:	\$97,035.00
Total Annual Cost Year 5:	\$100,433.00

Total Contract Value – Late Bus and Athletic Trip Transportation Years 1 – 5:	\$470,616.50
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SIGNATURE: _____



PRINTED NAME: _____

JOSEPH DOHERTY

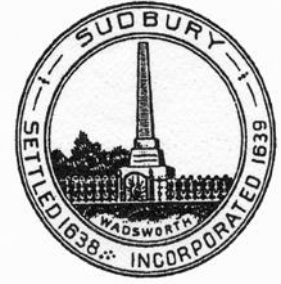
COMPANY NAME: FIRST STUDENT, Inc.

DATE: December 2, 2021

School Transportation Bid

IFB: #21-001

November 15, 2021



Sudbury Public Schools and Lincoln-Sudbury Regional High School

Sudbury Public Schools

40 Fairbank Road

Sudbury, MA 01776

(978) 443-1058

www.sudbury.k12.ma.us

Lincoln-Sudbury Regional High School

390 Lincoln Road

Sudbury, MA 01776

(978) 443-9961

www.lsrhs.net

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Sudbury Public Schools
40 Fairbank Road
Sudbury, MA 01776



Lincoln-Sudbury Regional High School
390 Lincoln Road
Sudbury, MA 01776

Donald R. Sawyer
Director of Business and Finance
donald_sawyer@sudbury.k12.ma.us

November 15, 2021

INVITATION TO BID - SCHOOL TRANSPORTATION (IFB #21-001)

The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee of Sudbury, Massachusetts, will receive sealed bids for furnishing school bus transportation for public school students for Sudbury Public Schools and Lincoln-Sudbury Regional High School, located in the Town of Sudbury, for a three (3) year period from July 1, 2022 to June 30, 2025. The School Committees reserve the right to extend the contract for up to two (2) additional one-year terms at the prices included in the bid sheet.

Contract documents, including specifications dated November 15, 2021 covering the required transportation routes, may be obtained via email request to transportation@sudbury.k12.ma.us or at the Sudbury Public Schools Central Office, 40 Fairbank Road, Sudbury, MA. School locations, existing bus routes, and all other information are available from the School Department Transportation office.

Each bid should be submitted on the bid form furnished in the specifications and addressed in an envelope clearly labeled "**School Bus Transportation Bid**" to the Sudbury Public Schools Business Office, 40 Fairbank Road, Sudbury, Massachusetts 01776, and **must be received no later than 11:00 a.m., December 2, 2021**. All bids will be publicly opened in the Superintendent's Conference Room and read aloud. Bids will be taken under advisement and held for School Committee consideration.

Each bidder must deposit security with his bid in the amount of Fifteen Thousand Dollars (\$15,000.00), either in the form of bid bond, certified check, or cashier's check, issued by a responsible bank or trust company, payable to the Town of Sudbury. All bids submitted will be binding for sixty (60) days subsequent to the bid opening.

The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee, reserves the absolute right to reject any or all transportation bids in whole or in part and to waive any informalities in bids received if it be in the public interest to so do. The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee herein declares its express purpose to award the contract to the lowest qualified, responsive, and responsible bidder that is able to furnish evidence satisfactory to the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee, that it has sufficient ability, experience and capital to execute and complete the work in accordance with the contract. Minimum evaluation criteria are specified in the bid documents.

SPECIFICATIONS - SCHOOL TRANSPORTATION

Following are the proposal and contract for furnishing school bus transportation for Sudbury Public Schools and Lincoln-Sudbury Regional High School

REQUIREMENTS AND CONTRACT

I. REQUIREMENTS

The contract for furnishing scheduled transportation for all designated school children for Sudbury Public Schools and Lincoln-Sudbury Regional High School, shall include the furnishing of all services necessary and required, consisting of the following in general: transportation equipment, maintenance of equipment, operation, supervision, inspection, registration, licensing, insurance, and conformance to all applicable laws, rules, and regulations of the Commonwealth of Massachusetts, Department of Motor Vehicles, Town of Sudbury, and the Sudbury Public School Committee and Lincoln-Sudbury School Committee.

The successful bidder will be required to enter into a written contract for a period of three (3) years, upon bid acceptance by the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee, for a usual one hundred eighty (180) days per school year, unless changed by the State Board of Education and/or the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee, commencing July 1, 2022 through June 30, 2025. The School Committees reserve the right to extend the contract for up to two additional one-year terms at the prices included in the bid sheet.

Payment is based on actual days transported. For calculations of this bid, please use one hundred eighty (180) days per school year.

II. GENERAL

Bids are to be submitted in a sealed envelope plainly marked "**School Bus Transportation Bid**".

A bid deposit shall be included with this bid in the form of bid bond, certified check, or cashier's check, issued by a responsible bank or trust company, in the amount of Fifteen Thousand Dollars (\$15,000.00), made payable to the Town of Sudbury. This amount shall function as a bid security until such time as the contract is awarded by the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee to the successful bidder.

All routes, runs, and other quantities contained in said form and elsewhere in this bid package are estimates and should not be interpreted by the bidder as the actual quantities. The Unit Price quoted by each bidder shall apply without change to any variation in said quantity actually experienced or applicable. The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee shall have the right to increase and decrease said quantities.

No bidder may withdraw its bid prior to the execution and delivery of the contract unless no award has been made at the expiration of sixty (60) days after the opening of the bids.

All bid security deposits will be returned to the unsuccessful bidders when the contract is awarded to the successful bidder.

If any bidder fails to perform, or is unable to perform, its agreement to execute a contract and furnish a performance bond, its bid deposit shall be forfeited to the Town of Sudbury as liquidated damages.

The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee may reject any bid that is not according to the prescribed form, incomplete, not properly signed, or otherwise contrary to instruction.

More than one proposal from an individual, a firm or partnership, a corporation, or an association under the same or different names will not be considered. Reasonable grounds for believing that any bidder is interested in more than one proposal for the work contemplated will cause the rejection of all proposals in which such bidder is interested. Any or all proposals will be rejected if there is a reason for believing that collusion exists among the bidders and all participants in such collusion will not be considered in future proposals for the same work.

A statement of non-collusion must be signed and included with each bid.

The bidder shall immediately report to the Director of Business and Finance any ambiguity or inconsistency, which the bidder may discover upon examination of the bid document. The bidder shall submit any questions regarding intent or meaning in writing. The Director of Business and Finance shall arrange addenda's that shall become a part of the contract and specifications; all questions so received, and shall send a copy of addenda's to all bidders. Unless the bidder shall have taken such action, and approval obtained, the bidder agrees with the specifications as written and described. The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee will not be held accountable for any oral instructions.

Addenda will be issued electronically to all known bid recipients. No addenda will be issued within the immediate three (3) business day period prior to the date of receipt set for such bids, except an addendum which withdraws or otherwise postpones the date of the bid opening. The official notice of withdrawal or postponement shall be the reading of record at the time and date set for receipt of such bids.

The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee does not assume any responsibility for errors, omissions, or misinterpretations, which may have resulted in whole or in part from the use of incomplete, bid documents to include addenda.

It is understood, agreed upon and made a part hereof, and shall be a part of the contract, that the contract entered into between the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee and the successful bidder(s) shall not be assigned nor assignable by way of sub-contract or otherwise, unless or until the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee shall have first assented thereto in writing.

The Director of Business and Finance reserves the right to ask any additional questions regarding bids in order to analyze the overall results.

Prospective bidders must submit with their bid a letters of reference list recording all contracts held within the past ten (10) years, name and address of the contact person, and dates the contracts were held.

No bid submittal shall be accepted from any contractor, company, company principal or subsidiary holding company who in the past ten (10) years, has defaulted on a contract, had a contract terminated for cause or has had a contract under suspension.

No bid submittal shall be accepted from any contractor, company, company principal or subsidiary holding company that in the past five (5) years have filed for reorganization under Chapter 11 of the U. S. Bankruptcy Code.

No bid submittal shall be accepted from any contractor, company, company principal or subsidiary holding company that has withdrawn a bid for any unacceptable reason.

No bid submittal shall be accepted from any contractor, company, company principal or subsidiary holding company that does not have acceptable experience in school bus transportation as evidenced by a minimum of five (5) years of successful operation.

The bidder may be required to submit copies of all accident reports for the previous three (3) years prepared and certified by and submitted directly to the Director of Business and Finance by the insurance carrier prior to the award of the bid.

III. CONTRACT AWARD

The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee, reserves the right to reject any and all transportation bids in whole or in part and to waive any informalities in bids if, in the sole judgment of the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee, such action serves the public interest. The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee herein declares its express purpose not to award to any bidder unable to furnish evidence, satisfactory to the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee, that it is a responsible bidder and has sufficient ability, experience, satisfactory performance record, and capital to execute and complete the work in accordance with the contract. Award of the contract will be made to the bidder submitting the lowest total price for a three (3) year contract, if such bidder has been deemed to be a responsive and reasonable bidder.

It is the purpose of the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee not to award a contract to any bidder who does not furnish satisfactory evidence of the following minimum evaluation criteria:

- Have the ability and experience in school bus transportation
- Have sufficient capital
- Are able to submit three (3) years audited financial statements by a certified public accounting firm. (Financial statements will not be for public view.)
- Have available buses meeting the requirements listed herein

- Provide evidence that all drivers, including substitute drivers, have annual Criminal Offender Record Information (CORI) checks with satisfactory results.
- Each bidder must submit a properly completed Statement of Collusion and Tax Compliance Certificate and submit it as part of the bid package.
- Each bidder must submit either the Certificate of Insurance for the required insurance amounts or a statement from its insurance company that it qualified for and will be issued insurance sufficient to meet the requirement of this bid.
- No bidder shall have been in a Chapter 11 bankruptcy proceeding within the past five years.
- Each bidder must submit all required bid forms in Section B.

The minimum evaluation criteria are the standards that will be used to evaluate whether the bid is “responsive” and to identify “responsible” bidders.

The Awarding Authority's notice of acceptance of proposal based on the best price per the lowest total price by a qualified and responsible bidder shall be given or mailed by the Director of Business and Finance within thirty (30) business days after the opening of bids. Said notice to the successful bidder(s) shall constitute acceptance of the proposal or any item thereof, conditioned on the submission by the successful bidder to the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee of evidence of ability to perform satisfactorily, receipt of the successful bidder's performance bond and execution of the contract both by the bidder and the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee.

The bidder(s) to whom the award(s) are made must enter into a written three (3) year contract. The requirements set forth in the specifications are considered binding and a part of the contract with the successful bidder. Should any Contractor to whom an award is made fail to enter into a contract within thirty (30) days after receipt of notice of the award, its bid deposit shall be forfeited to the Town of Sudbury as liquidated damages.

IV. SURETY PERFORMANCE BOND

A surety performance bond or other instrument satisfactory to the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee in an amount equal to one hundred percent (100%) of the contract sum for each year of any contract entered into shall be required of the successful bidder by the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee, the premiums for which are to be paid by the bidder(s). The liability of the Contractor in case of default of this contract(s) is not limited by this paragraph. The surety performance bond shall be renewed annually during the term of the contract. Performance bonds must be from a Massachusetts registered insurance company. The performance bonds must be provided to the office of the Director of Business and Finance prior to the signing of any contract.

The surety is to be a bonding company satisfactory to the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee, which has a rating of B+ or better, and having

a place of business in Massachusetts. Bonds shall be in the usual form and satisfactory to counsel for the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee. Each bond or letter of credit shall be renewed by July 1 annually for the appropriate amount each year. The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee must have in its possession the bond renewal prior to the expiration of the preceding bond.

V. PERFORMANCE

On days when school closes other than on the regular schedule, the Contractor shall transport the pupils at times designated by the Sudbury Superintendent of Schools and/or Lincoln-Sudbury Regional High School Superintendent of Schools, or his/her designee.

If, for any reason, a bus(es) cannot be operated on any school day, the Contractor agrees to provide suitable insured transportation in place thereof, without additional charge.

In the event the Contractor is unable to furnish transportation temporarily, the Sudbury Superintendent of Schools and/or Lincoln-Sudbury Regional High School Superintendent of Schools or his/her designee is authorized to hire a bus(es) for such time as necessary, and the Contractor shall pay for the cost of this emergency service.

The Contractor shall designate by name and position a particular staff member who shall be assigned to coordinate transportation arrangements under the contract and to carry out instructions submitted by the Sudbury Public Schools and Lincoln-Sudbury Regional High School. This person will be available to the Director of Business and Finance and designated staff for the purpose of conferences and consultations relative to bus schedules, bus routes, bus stops, pupil behavior, billing and other related matter. The supervisor on site is to be in charge of the routes for the Sudbury Public Schools and Lincoln-Sudbury Regional High School. Such person will be in direct communication with the transportation agent of the schools, to insure the orderly transportation of students to and from school. Sudbury Superintendent of Schools and/or Lincoln-Sudbury Regional High School Superintendent of Schools must approve the supervisor annually.

The Contractor must have an office serving Sudbury Public Schools and Lincoln-Sudbury Regional High School, with a telephone connection through which the owner or his/her agent is available from 6:00 a.m. to 4:30 p.m. on days when schools are in operation. There must also be a local telephone connection through which the Sudbury Superintendent of Schools and/or Lincoln-Sudbury Regional High School Superintendent of Schools can make contact with the supervisor or other designee in the early morning hours in order to notify the Contractor of cancellations or delays in school opening times due to bad weather or emergencies. The owner or his/her agent must be willing to appear for conferences with the Sudbury Public School Committee, the Lincoln-Sudbury Regional School Committee, Superintendent, or his/her designee, as necessary and requested.

The Contractor must also maintain at least one (1) full-time mechanic to be accessible and available to service the fleet. The full-time mechanic cannot serve as the full-time supervisor.

Buses shall be on the premises of the school buildings to deliver children in the morning no later than five (5) minutes before the opening of school. At no time shall buses be allowed to idle their engines on school property for longer than two minutes.

VI. EQUIPMENT

The Contractor shall furnish school buses that must, among other things, meet the following requirements:

The bid proposal must include at least twenty-seven (27) buses at the start of the contract period.

No bus shall in any case be older than seven (7) years at the start of the contract year or have cumulative mileage in excess of 100,000 miles at the start of the contract year. All buses must conform to all State and Federal regulations.

All school buses available for use under the life of this contract must have minimum seating capacity of seventy-one (71) pupils conforming to the Standard Specifications or better. 83 or 77 passenger buses must be used when deemed necessary by the prescribed routes. All 83 passenger buses must be air brake equipped for safety purposes to compensate for terrain for the Sudbury community. Chassis and body must conform to all Federal standards and fully meet or exceed all requirements of the Commonwealth of Massachusetts for school buses in effect as of the start of this contract period.

All buses shall be constructed, equipped and maintained in conformance with all applicable laws, regulations, and rules of the Federal Government and the Registry of Motor Vehicles. The attention of all concerned is particularly directed to the following sections of Chapter 90 of the General Laws of the Commonwealth of Massachusetts:

- Section 1, Definitions
- Section 1A, School Bus Registration
- Section 7A, Inspection of School Buses
- Section 7B, Requirements as to Equipment and Operation of School Buses
- Section 7C, Registrar May Establish Minimum Standards for Construction, Etc., of School Buses
- Section 14/15, Precautions for Safety
- Section 17, Speed Limit in Operation of School Buses

Buses furnished must comply with the General Laws of the Commonwealth of Massachusetts and the rules and regulations of the Registry of Motor Vehicles relating to the transportation of public school children. All vehicles must be School Bus Yellow for regular pupil transportation.

Contractor shall see that all buses are kept at all times in a condition of cleanliness, interior and exterior, satisfactory to the Sudbury Superintendent of Schools and/or Lincoln-Sudbury Regional High School Superintendent of Schools or his/her designee.

All buses shall be cleaned by sweeping and vacuum cleaning, and shall be maintained free of noxious odors and poisonous gases at all times. The interior shall be washed with a water mixture of detergent disinfectant during each school vacation period; Winter, February, April and Summer. The interior and exterior surfaces of all windows shall be maintained in a clean and safe condition, weather conditions permitting. Under no circumstances shall buses be operated when the driver's vision is impaired by conditions of the glass surface to the point where safety of school children is placed in jeopardy.

The temperature of the bus interior shall be maintained at minimum temperature of fifty-five (55) degrees when the bus is occupied. Windows that are to be used for ventilation must be in working order.

Coach type buses will be allowed in the bid proposal for trips for student field trips or trips for athletic events. No guarantee is made by the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee for the amount of transportation to be performed for these events.

Each bid shall contain a detailed description on forms provided, of each bus to be furnished including the year of manufacture, model number, present mileage, make of body, seating capacity, number of heaters and present condition. The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee reserves the right to reject any unacceptable vehicle.

- Bidder must submit with bid data documentation identifying and detailing composition of bus fleet to be used as of the beginning of this contract.
- Bidder must, in submitting the above data, give clear evidence of a commitment to replacing/updating the fleet to be used during the contract as needed. The fleet used must have prior approval of the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee or designee.
- In the event successful bidder does not have a fleet currently available to meet the requirements, the successful bidder shall deliver to the Superintendent of Schools within thirty (30) business days after notice of the acceptance of proposal is given or mailed by the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee or designee to the successful bidder, documentation satisfactory to the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee as specified in the requirements.

The Contractor agrees to keep all buses in good working condition, and to furnish all necessary gasoline, oil, grease, tires, maintenance and repairs through the period of this contract.

Written reports of conditions of buses as determined at the time of inspections shall be presented to the Business Manager no later than two (2) days following the date of inspection by the Registry of Motor Vehicles.

The Sudbury Public Schools and Lincoln-Sudbury Regional High School reserves the right to require, at the Contractor's expense, a certificate at any time from a garage of its choosing that the buses under this contract are in good order with respect to brakes, lights, horns, mufflers, steering gear, windshield cleaners, doors, tires, windows and bodies and in any other respect.

There shall be no substitution of buses without permission of the transportation agent for the duration of the contract, except in the cases of emergency breakdown, and then only for a period of time not exceeding three (3) consecutive days. All substitute buses shall be subject to all contract requirements.

In carrying out the performance of the contract, the bus owner shall have and keep three (3) buses for emergency or spare use. Such buses shall comply with all provisions of the specifications and be listed on the Description of Equipment Form.

The contractor will park the buses on the land reserved for that purpose which is provided by the Town of Sudbury, rent free. The contractor shall pay all vehicle excise taxes to the Town of Sudbury. The contractor will provide a telephone and other utilities required by the office. The contractor will be responsible for installation and all other expenses for utilities. The contractor shall be responsible for the keeping the grounds and the office clean.

Each bus shall display "Sudbury Public & Lincoln Sudbury Regional School District" on each side of the bus. Each bus will also prominently display route numbers on all four (4) sides of each bus either by permanent lettering or by removable placard.

Each bus will be equipped with all equipment required by the Registry of Motor Vehicles plus the following:

- Properly equipped first aid kits.
- Public address system with internal and external speakers capable of operation with the ignition of the bus off.
- Two-way UHF-type radio with capabilities of reaching all the extremities of the Town of Sudbury.
- GPS tracking is required for all buses
- Automatic side-stop arms.
- All buses will be equipped with 2 cameras, one in front and one in the middle, with software compatible with PC platforms. Recordings may only be viewed by authorized school officials and with the consent of the School Districts. Under no circumstances will recordings be made public by the Contractor without the consent of the School Districts.

VII. OPERATIONS

The Contractor shall arrange compulsory driver-training and safety programs which drivers must pass before they are allowed to drive under this contract. The course shall deal with student, staff, and public interaction; safe driving habits, including evacuation drills; proper use of two-way radios, and emergency procedures in accordance with state laws and town guidelines. All drivers must retake and pass the course annually. New drivers hired during the year are under the same

obligation. The Contractor must submit to the administration, by August 1, the program description. Within the development of its driver training and safety programs, the Contractor must ensure that at a minimum all drivers receive the following special training.

- Orientation and special instructions regarding student behavior and control.
- Training twice each school year (minimum late September and January) in student behavior standards and appropriate measures to be taken if problems occur.
- Emergency Epi-pen training and other medical training as needed, such as seizure protocol.
- Sexual harassment training.
- CPR and choke training.

All persons assigned as regular or substitute drivers must be acceptable to the Superintendents of Schools or his/her designee prior to the opening of school each year. This measure includes a satisfactory Fingerprinting and CORI process.

Bidders must provide evidence that they are in compliance with all requirements for drug testing. The description of this program should discuss both company policies regarding substance abuse and company procedures on drug testing.

The Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee reserves the right to accept or reject any and all drivers, if it is deemed in the best interests of the Town of Sudbury to do so. Further, the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee reserves the right to require any operator to submit to physical examination at any time, at the sole cost of the Contractor, by a doctor of medicine selected by the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee.

The Contractor agrees to comply with rules, regulations, and requirements of Chapter 90, Section 8A/8A½, General Laws of Massachusetts, and amendments thereto, in respect to the licensing of school bus operators, which statues indicate in part the "Applications for a license to be a school bus operator may be made by any person who shall have attained the age of eighteen (18) years and who shall have been a duly licensed motor vehicle operator for a period of three (3) continuous years prior to his application; but before such a person shall be so licensed the Registrar shall be satisfied that he is of good moral character and has successfully completed a driving performance test, a visual test, and a physical examination by a licensed physician within a three (3) month period of the date of his application in conformity with such minimum physical qualifications as shall be determined by the Registrar."

The Contractor shall see that all drivers have on file with the Contractor a report, made by a registered physician, that he/she is in sound physical condition and capable of performing the duties of a school bus driver. The physical examination certificate must be submitted once a year, as required by law. In addition to annual physicals, all drivers shall have a chest x-ray each three (3) year period and such report is also filed.

The Contractor shall not alter any bus stop or change the direction of any route without prior written approval of the Transportation Agent. Drivers are to take on and discharge passengers

only at scheduled stops. If conditions warrant adding additional stops or changing location of a stop(s), this information must be communicated to the Transportation Agent for consideration and action relative thereto.

Accidents: Every accident is to be reported by the driver to the Contractor as soon as possible thereafter, and the Contractor will notify the proper school authorities. In all such cases, this report is to be rendered orally to the school authorities as soon as possible and no later than twenty-four (24) hours after the accident. In cases of bodily injury, the Contractor is to file a written report with the appropriate school official within twenty-four (24) hours.

Unavoidable Delays: If any event or circumstance causes unavoidable delay or in any way interferes with the proper performance of a scheduled trip, the Contractor is to report the same to the school authorities as soon as possible.

Drivers shall not be permitted to carry any person other than a school official or teacher, including the children of drivers, while carrying pupils unless the Transportation Agent authorizes such person. Pupils shall not be carried for pay or otherwise by private arrangement while the bus is being used to fulfill the requirements of these specifications.

There shall be no smoking by drivers in the vehicles at any time or on any school property at any time.

Drivers must comply with all policy set forth by the School Administration covering the conduct of pupils on the bus approved by the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee.

Drivers will not leave a bus unattended when children are in the bus. In an emergency, the driver's first concern must be for the safety of the children.

The Contractor will be responsible for conducting School Bus Safety Drills and Demonstrations as required by Massachusetts law at no additional charge to the Town of Sudbury. Times of this program will be coordinated with the Transportation Agent and building principals.

A roster of those licensed operators to be used under the contract shall be maintained by the Contractor. Said list shall be furnished to the Transportation Agent prior to the opening of schools and thereafter at any time requested. Any changes shall be immediately communicated in writing. Said list should contain the following information:

Name, Address, Date of Birth, Date of Last Physical, License Number, Type of License, Driving Record to include all known accidents and traffic violations in the past two (2) years, Criminal Record (if any), and specific training and testing.

The Superintendent of Sudbury Public Schools or the Superintendent of Lincoln Sudbury Regional High School or his/her designee reserves the right to require the temporary or permanent removal, from the Contractor's roster of drivers to be employed under the contract, any driver who does not properly conduct himself/herself or maintain order and proper discipline among his/her passengers, or who shall operate his/her conveyance in a negligent or reckless manner, or who shall for any other reason be deemed unfit or unsuitable by the School

Administration or the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee.

The Contractor will provide a log of driver attendance at mandated annual trainings to the Director of Business and Finance.

Vehicles used to transport pupils shall not be used to display either inside or outside of the vehicles, any advertisement, political or other, without the express authorization of the Superintendent of Sudbury Public Schools or the Superintendent of Lincoln Sudbury Regional High School or his/her designee.

Drivers will not take disciplinary action against any child. Cases that warrant such action should be reported on forms provided by the School Department in accordance with School Department policy and procedures. Nothing herein shall prevent a driver from reprimanding a child from action that might cause harm to him or others. Drivers have no authority to put a student off a bus or to deny transportation.

Drivers will make an inspection of their bus to insure the bus is in good running order prior to the start of the school bus runs. At the close of the routes, drivers must walk to the back of the bus to insure that no student remains on the bus and place an "EMPTY" placard in the rear window.

Every driver shall make a dry run, without cost to the Town of Sudbury, over his/her route prior to the first day of actually transporting students.

All drivers must understand that **only** Sudbury Public Schools and Lincoln-Sudbury Regional High School students, with the exception of chaperones on school trips and an occasional school administrator for reviewing routes or student behavior, may be transported in these buses unless prior permission of the Transportation Agent has been obtained. Violations of this procedure are cause for immediate dismissal of the driver.

Substitute Drivers: Substitute drivers shall be pre-qualified for the routes driven, to the maximum extent possible, at no extra cost to the Town of Sudbury. This means that the Contractor shall operate with an available reserve of "qualified" substitute drivers. Such qualifications shall be established by:

- holding a valid and current school bus driver's license
- being familiar with the route(s) to be driven
- knowing the locations and starting and closing times of the schools and programs
- knowing the roads and their conditions over the course of the route(s) to be driven

All drivers must be able to speak and clearly communicate in the English language.

If the Contractor fails to comply with this section, the Contractor shall, as a condition for the awarding of the contract, pay the School Committee the amount specified not as a penalty but as liquidated damages for Breach of Contract for each calendar day. One Hundred Dollars

(\$100.00,) per day per bus - the amount of liquidated damages, is fixed and agreed upon by the Contractor and School Committee because of the extreme difficulty and impracticality of fixing and ascertaining the actual damages. Said amount shall be deducted from the Contract amount and, at the School Committee's discretion, may be deducted from the monthly payment to the Contractor.

VIII. WAGE SCALE

The Conditions of Employment and Minimum State Wage Rates, as set forth by the Massachusetts Department of Labor and Industries shall prevail in the execution of work under this contract. The MINIMUM WAGE RATES as determined by the Commissioner of Labor and Industries under the provisions of Massachusetts General Laws, Chapter 71, Section 7A, is attached and becomes a part of this document.

The Contractor is required, upon request, to submit to the Director of Business and Finance certified weekly payroll reports which must contain the following: employee's name, address, occupational classification, hours worked (chargeable to contract) and wages paid.

IX. INSURANCE

The Contractor shall hold harmless and indemnify the Town of Sudbury & Town of Lincoln, its officers, employees and agents, from and against all liability, damage, loss, claims, demands, and actions of any nature whatsoever, including the cost of defending any action, which arise out of or are connected with, or are claimed to arise out of or be connected with any of the transportation services provided to the Town of Sudbury and Town of Lincoln under any said contract or contracts. The foregoing provision shall not be deemed to be released, waived, or modified by reason of any insurance provided there under by the Contractor.

The Contractor shall take out and maintain during the life of this contract such Public Liability and Property Damage Insurance as shall protect him from claims for damages for personal injury, including accidental death, as well as from claims for property damage, which may arise from operations under this contract, whether such operations be by him/her or by anyone directly or indirectly employed by him/her and the amount of such insurance shall be minimally certification of insurance with a ninety (90) days cancellation clause for:

Workers' Compensation

Auto Liability/Bodily Injury/Property Damage \$10,000,000 combined single limit

Uninsured Motorist - Bodily Injury \$500,000 each person/\$1,000,000 each accident

Under-Insured Motorist - Bodily Injury \$500,000 each person/\$1,000,000 each accident

General Liability \$1,000,000 per occurrence/\$2,000,000 aggregate

The insurance carrier on all policies must be rated B+ or greater and be an admitted carrier in the Commonwealth of Massachusetts.

The certificate of insurance for all of the required insurance shall contain the following language: "No cancellation of or change of or revision in the insurance by the Insurer or the Insured, the existence of which insurance is evidenced by this certificate, shall be valid unless written notice thereof is delivered to the Superintendent of Sudbury Public Schools and/or the Superintendent

of Lincoln Sudbury Regional High School at least ninety (90) days prior to the intended date of cancellation, change or revision, by certified mail."

Failure to provide and continue in force the required insurance shall be deemed a material breach of this contract and shall be cause for immediate termination thereof.

Prior to July 1 of each year of the contract, the Contractor shall deposit with the Superintendent of Sudbury Public Schools and the Superintendent of Lincoln Sudbury Regional High School certificates from the insurer to the effect that the insurance policies required in the above section have been issued to the Contractor. The certificates must be in a form satisfactory to the Director of Business and Finance.

X. PRICE BASIS

The contract prices shall include the cost of fuel, garaging, oil, grease, repairs, wages of drivers, taxes, licenses, permits, certificates, insurance costs, and such other charges as are needed in connection with the contract work and to keep the school buses properly equipped and in good operating condition.

Wages: Under the provisions of Massachusetts General Laws Chapter 71, wages paid to motor bus operators must conform to the prevailing wage rate as determined by the Commissioner of Labor and Industries, a copy of which is attached in Appendix C.

XI. CONTRACT TERMS

The bid document to be submitted as a sealed bid requires that a bid amount be submitted for each year of the contract:

July 1, 2022 – June 30, 2023 – Fiscal Year 2023

July 1, 2023 – June 30, 2024 – Fiscal Year 2024

July 1, 2024 – June 30, 2025 – Fiscal Year 2025

The bid for each contract year must be split out as to the cost for coordinated and uncoordinated bus transportation. If the number of routes is increased or decreased, the contract price shall increase or decrease accordingly, in an amount equal to the applicable unit price.

Definitions:

3-Way Coordinated: A bus that is scheduled to do three morning routes and three afternoon routes coordinated between Sudbury Public Schools and Lincoln-Sudbury Regional High School.

2-Way Coordinated: A bus that is scheduled to do two morning routes and two afternoon routes coordinated between Sudbury Public Schools and Lincoln-Sudbury Regional High School.

1-Way Uncoordinated: A bus that is scheduled to do one morning route and one afternoon route for Sudbury Public Schools and Lincoln-Sudbury Regional High School.

Lincoln Only: A bus that is scheduled to do morning and afternoon route outside the Town of

Sudbury which services only Lincoln, MA Students to and from Lincoln-Sudbury Regional High School.

Through this bid, the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee is seeking a fixed cost for transportation services for each fiscal year.

The three years are added for a total bid for the contract. All bid numbers are to be submitted on the attached forms. The “low bid” will be determined by this total.

No adjustment clauses have been written into these bid specifications for fuel, insurance, or inflation factors.

The successful bidder shall assume responsibility for any cost factors imposed by the federal or state regulations subsequent to the signing of this contract.

XII. PAYMENTS

The Town of Sudbury agrees to pay the Contractor in ten (10) monthly payments for services rendered under the contract based upon the yearly contract at the conclusion of each month, September through June, upon satisfactory performance of said service. Contractor shall bill monthly by itemized invoice.

The above consideration to be paid by the Town of Sudbury is based upon the transportation of pupils as specified in the aforesaid Specifications.

Should the Contractor be unable or unwilling to convey pupils on any school day during the term of this contract, whether because of breakdowns, motor difficulties, unsafe buses or other motor vehicles, negligence on the Contractor’s part, strikes, riots, acts of God, or any other reason, then the daily compensation rate shall not be paid to the Contractor for such school days.

No assignment or subletting of the contract, or work, nor assignment of money due or to become due, shall be made without the written consent of the Sudbury Public Schools Committee and Lincoln-Sudbury Regional High School Committee. This shall include needing School Committee approval to transfer the contract should the company be sold to another company.

No compensation shall be due or made by the Sudbury Public Schools and Lincoln-Sudbury Regional High School Committee for non-conforming performance.

XIII. ASSUMPTION OF LOSS AND LIABILITY

The Contractor agrees that he/she shall pay for or cause to be paid for all labor performed or furnished, all materials used or employed in the performance of the work under this contract, and all rental or hire of appliances and equipment employed in such work.

The Contractor is retained solely for the purpose and to the extent set forth in this agreement. During the term of this contract, the Contractor's relationship to the Town of Sudbury and Town of Lincoln shall be that of an independent contractor. The Contractor shall have no capacity to involve the Town of Sudbury and Town of Lincoln in any contract or to incur any liability on the part of the Town of Sudbury and Town of Lincoln. The Contractor shall agree

to indemnify and save the Sudbury Public Schools Committee and Lincoln-Sudbury Regional High School Committee and the Town of Sudbury and Town of Lincoln harmless from any and all costs, loss, expenses, liability, damages or claims for damages, including costs of defending any action on account of any injury or damage done to buildings, property, or any person, firm corporation or association and on account of any injury, including death, to any person(s) arising or resulting from the services provided under the contract documents or from any act, omission or negligence of the Contractors, their agents or employees. The foregoing provisions shall not be deemed to be released, waived, or modified in any respect by reason of any surety or insurance provided by the contractors under the contract.

XIV. TERMINATION OF CONTRACT

The Town of Sudbury and Town of Lincoln, through the Sudbury Public Schools Committee and Lincoln-Sudbury Regional High School Committee, may terminate this contract.

- Termination may be based on default in performance, nonconformity in performance, breach of the terms and conditions of this contract, failure in any respect to perform the service with promptness and diligence, bankruptcy, receivership or a general assignment for the benefit of creditors or any other act which impairs the value of service under this contract.
- Termination may be based on the said Town of Sudbury and Town of Lincoln shall fail lawfully to appropriate sufficient funds for said transportation.

XV. LAWS AND PUBLIC POLICY

This contract is made subject to all laws of the Commonwealth of Massachusetts. Any clause which does not confirm to such laws shall be void, and such laws shall be operative in lieu of such clause.

The Contractor shall keep itself fully informed of and agrees to comply with pertinent Federal, State, and municipal laws, ordinances, rules and regulations in any manner affecting the services embraced in this contract.

In the event that the Districts or any governmental agency imposes additional equipment requirements other than those set forth above on Contractor's vehicles during the term of this Agreement which are specific requirements for the operation of this contract or immediate installation is required for continuing operation of the vehicles, Contractor and District shall negotiate in good faith concerning price increases applicable to such equipment installation.

XVI. DESCRIPTION OF ROUTES

Current bus routes and Town of Sudbury and Town of Lincoln maps are available for review at the Transportation Office.

The Transportation Agent shall have the authority to make such changes as he/she deems necessary in adjusting the number of buses, assignments of pupils, groups or routes, time

and dates, assignment of monitors, or any other matters affecting the specific and unlimited right to eliminate, modify, add to, or revise any bus route in accordance with the needs of the Sudbury Public Schools and Lincoln Sudbury Regional High School as determined by the Superintendents or his/her designee. Routes have been designed and implemented to maximize the capacity of each bus.

THE CONTRACTOR MUST HAVE A SUFFICIENT NUMBER OF SUBSTITUTE DRIVERS TO ENSURE ALL TRIPS CAN BE MADE AT THE SCHEDULED TIMES. THERE SHALL BE NO “DOUBLING-UP” OF TRIPS.

THE CONTRACTOR MUST HAVE SUFFICIENT DRIVERS AND EQUIPMENT TO HANDLE ATHLETIC TRIPS WITHOUT IMPACTING THE REGULAR DAILY ROUTES.

XVII. TIME SCHEDULES AND ADDITIONAL INFORMATION

Approximate scheduled school hours for the school year 2022-2023 are as follows. No guarantees as to actual times are implied.

Routes and schedules are to accommodate class schedules and shall be determined by the Sudbury Public Schools and the Lincoln Sudbury Regional School District. The following are the approximate schedules and may be changed for reasons which include, but are not limited to, time and learning mandates set by the Department of Education or for early release days as scheduled for regular transportation:

	BEGIN	DISMISS
Lincoln Sudbury Regional High School (LSRHS)	8:25 a.m.	3:14 p.m.
LSRHS – Early Release		1:55 p.m.
Curtis Middle School	8:30 a.m.	3:10 p.m.
Curtis Middle School Early Release		12:45 p.m.
Haynes, Loring, Nixon, Noyes Elementary	7:55 a.m.	2:25 p.m.
Haynes, Loring, Nixon, Noyes Elementary Early Release		11:45 a.m.

The schedule of route operation shall be maintained in such a manner that school children awaiting bus arrival shall not be required to wait longer than ten (10) minutes beyond the scheduled time of the stop. The first stop of any bus for any pupil in the Town shall not be before the time set on the bus schedule for that run.

On various occasions throughout the year, the public schools and the regional school district may dismiss early (day before Thanksgiving) or selected schools may dismiss early (high school mid- year and final exam days, workshop days. etc.). The contractor shall accommodate these early dismissals at no additional cost to the School Department.

The contractor will also agree to delay, at no additional cost, the morning routes on any day that the Superintendents of Schools institutes a delayed opening of school due to adverse conditions.

All routes, time schedules, etc. shall be fixed by the Directors of Business and Finance or designee. The School Committees reserve the right to change these routes from time to time without altering the contract or contract price.

Pickup and Discharge Points: The Director of Business and Finance reserves the right to change or designate additional pickup or discharge points when it is necessary for the safety and welfare of the children, with no additional cost to the Town of Sudbury or Town of Lincoln.

A copy of the 2021-2022 school calendar is attached (Appendix B) for reference purpose showing a representative sample of release days. All bid prices should reflect split dismissal times as required.

XVIII. ATHLETIC TRIPS, ACTIVITIES, AND FIELD TRIPS

The Contractor agrees to provide a bus(es) with qualified school bus operators to transport students to and from athletic and such other extracurricular activities (field trips) as the School Committee or Superintendent of Schools, or his/her designee, may request from time to time: only live mileage is to be paid for - excluding the mileage from the Contractor's garage to the first pickup point and from the last drop-off point to the Contractor's garage. At certain times, up to four (4) vehicles under this section may be required.

In the Bid Sheet for furnishing additional transportation for athletic and extracurricular trips (field trips), the bid will be submitted with a minimum charge and a per mile cost for the bus, and state a charge for waiting time which will be paid in excess of two (2) hours. Additional costs, such as for tolls and fees, should be included in the quoted prices per trip.

All physical standards of the bus(es) used for additional transportation and the operators of the buses shall conform to those requirements set forth in this specification.

Payment for services provided under this section will be paid upon receipt of an itemized invoice.

Sudbury Public Schools and Lincoln Sudbury Regional High School Bus Transportation Bid

Submission of Bid Checklist

All bids submitted must be in a sealed envelope clearly labeled “School Bus Transportation Bid.”

All of the following items must be submitted with final sealed bid:

- Bid Submission Cover Sheet
- Bid Sheets – Regular Day Transportation
Athletic, Student Activity, and Field Trip
- Business Experience and Ability to Perform
- Description of Equipment to be used under the contract
- Certificate of Non-Collusion and Tax Compliance Certification
- Roster of Proposed Drivers
- Letter of Reference List recording all contracts held within the past ten (10) years
- Three (3) years of audited financial statements by a certified public accounting firm
- Bid deposit of \$15,000 made payable to the Town of Sudbury
- Certificate of Insurance and Insurability
- Garaging Plan
- Drug Policy and Testing Plan

BID SUBMISSION COVER SHEET

MUST ACCOMPANY ALL BIDS SUBMITTED

TO: Sudbury Public Schools Committee and Lincoln Sudbury Regional High School School Committee, Sudbury, MA 01776

I (We) submit the attached bid for school bus transportation, agreeing to meet ALL REQUIREMENTS of the specifications and ALL INSTRUCTIONS contained in the Invitation to Bid, Notice to Bidders and Bid Sheet.

The undersigned understands that the Sudbury Public Schools Committee and Lincoln Sudbury Regional High School Committee herein addressed reserves the right to waive any informalities, to reject any and all bids or any part thereof, and/or accept any bid or part thereof.

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals.

With the above understanding, the undersigned proposes to furnish to the Sudbury Public Schools and Lincoln Sudbury Regional High School student transportation, to comply in all respects with said specifications and to work in harmony and cooperation with the Sudbury Public Schools and Lincoln Sudbury Regional High School, for the contract sums listed on the attached Bid Sheet.

_____ SSN or Federal ID Number	_____ Name of Company
_____ Date	_____ Signature of Corporate Officer
	_____ Typed Name & Title of Above Officer
	_____ Address
	_____ City State Zip
_____ Seal	_____ Telephone Number
	_____ Fax Number

BID EVALUATION FORM– REGULAR TRANSPORTATION

YEAR 1 - 2022 - 2023

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180		
Coordinated 2 – Way Bus	25	180		
Uncoordinated 1 – Way Bus	2	180		
Lincoln Only	3	180		

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 1:	
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BID EVALUATION FORM– REGULAR TRANSPORTATION

YEAR 2 - 2023 - 2024

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180		
Coordinated 2 – Way Bus	25	180		
Uncoordinated 1 – Way Bus	2	180		
Lincoln Only	3	180		

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 2:	
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BID EVALUATION FORM– REGULAR TRANSPORTATION

YEAR 3 - 2024 - 2025

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180		
Coordinated 2 – Way Bus	25	180		
Uncoordinated 1 – Way Bus	2	180		
Lincoln Only	3	180		

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 3:	
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BID EVALUATION FORM – REGULAR TRANSPORTATION

YEAR 4 - 2025 - 2026

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180		
Coordinated 2 – Way Bus	25	180		
Uncoordinated 1 – Way Bus	2	180		
Lincoln Only	3	180		

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 4:	
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BID EVALUATION FORM – REGULAR TRANSPORTATION

YEAR 5 - 2026 - 2027

1. Regular School Transportation	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Coordinated 3 – Way Bus	0	180		
Coordinated 2 – Way Bus	25	180		
Uncoordinated 1 – Way Bus	2	180		
Lincoln Only	3	180		

2. Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		

3. Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

Important Note: For purposes of determining the lowest price, Sudbury Public Schools and Lincoln Sudbury Regional School District have estimated the number of one-way; two-way; and three-way coordinated busses. The Sudbury Public Schools and Lincoln Sudbury Regional School District reserve the right to change the coordinated schedule to utilize the fleet of busses most efficiently.

Total Annual Cost (Sum of 1. – 3.) Year 5:	
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TOTAL COST FOR REGULAR TRANSPORTATION

Total Annual Cost Year 1:	
Total Annual Cost Year 2:	
Total Annual Cost Year 3:	
Total Annual Cost Year 4:	
Total Annual Cost Year 5:	

Total Contract Value - Regular Transportation Years 1 – 5:	
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SIGNATURE: _____

PRINTED NAME: _____

COMPANY NAME: _____

DATE: _____

BID EVALUATION FORM – LATE BUS AND ATHLETIC TRIPS

YEAR 1 - 2022 - 2023

Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

YEAR 2 - 2023 - 2024

Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

YEAR 3 - 2024 - 2025

Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

YEAR 4 - 2025 - 2026

Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

YEAR 5 - 2026 - 2027

Late Bus Transportation (if can't be Coordinated)	# Buses / Day	# School Days	Bid Price Cost / Bus / Day	Annual Cost
Lincoln Sudbury High School Late Bus	2	150		
Athletic Trips				
175 Trips (based on 2.5 hour trip time plus 3 hour wait time)				

BID EVALUATION FORM – LATE BUS AND ATHLETIC TRIPS

Total Annual Cost Year 1:	
Total Annual Cost Year 2:	
Total Annual Cost Year 3:	
Total Annual Cost Year 4:	
Total Annual Cost Year 5:	

Total Contract Value – Late Bus and Athletic Trip Transportation Years 1 – 5:	
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SIGNATURE: _____

PRINTED NAME: _____

COMPANY NAME: _____

DATE: _____

BUSINESS EXPERIENCE AND ABILITY TO PERFORM

1. How long have you been in the school bus transportation business?

Established - _____

Years Incorporated - _____

2. How many school buses do you own at present? _____ Buses

3. With what school department (s) are you now under contract? Number of buses committed to each contract?

Town	Number of Buses	Contact Person	Phone Number

4. List office personnel, telephone numbers, maintenance staff, maintenance facilities, spare motor vehicle equipment, other.

5. State plan for the location and garaging of buses used to provide transportation services to the Sudbury Public Schools and Lincoln Sudbury Regional High School.

6. Include other pertinent information as required for your bid including:

Evidence/description of driver training program

Evidence/description of drug testing program

7. Have you/your company defaulted on a contract, had a contract terminated for cause or had a contract under suspension, suspended or revoked, or declared bankruptcy within the last five (5) years?

_____ Yes _____ No

8. Is your firm involved with current or pending bankruptcy proceedings and/or other current or pending litigation? If yes please provide:

9. Attach a list of references including the names and phone numbers of a contact person for all contracts you have held within the last ten (10) years including dates.

10. Please describe maintenance program for all equipment.

Maintenance Facility: _____

Location _____

Staffing _____

Capability: _____

Description of Preventative Maintenance Program:

Description of Equipment

Please complete for all equipment included in this bid

Vehicle ID Number _____ Model Year _____ Seating Capacity _____

Make of Chassis _____ Make of Body _____

Present Mileage _____ Mileage Rating _____

Type of Fuel _____ Number of Heaters _____ Present Condition _____

**SUDBURY PUBLIC SCHOOLS
AND LINCOLN SUDBURY REGIONAL HIGH SCHOOL**

SCHOOL BUS TRANSPORTATION BID

To: The Sudbury Public School Committee and the Lincoln Sudbury Regional School Committee

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and with collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals.

Signature of individual submitting bid or proposal _____

Title _____ Name of Business _____

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes.

Signature of individual submitting bid or proposal _____

Title _____ Name of Business _____

APPENDIX A - TRANSPORTATION CONTRACT SUDBURY PUBLIC SCHOOLS AND LINCOLN SUDBURY REGIONAL HIGH SCHOOL

THIS AGREEMENT is made this ___ day of _____ in the year ____ by and between the Sudbury Public Schools, having a usual place of business of 40 Fairbank Road, Sudbury, Massachusetts and the Lincoln Sudbury Regional High School, duly organized under the laws of Massachusetts and having a usual place of business at 390 Lincoln Road, hereinafter referred to as the “Districts”, and _____, having a usual place of business at _____, hereinafter referred to as the “Contractor.”

WITNESSETH, as follows, that the Contractor agrees to furnish regular transportation and deliver for the Sudbury Public Schools and the Lincoln Sudbury Regional High School, pupils attending the schools from such places and at such times and for such considerations as is set forth in the Transportation Specifications dated November 15, 2021 (Invitation to Bid, Bid Forms, and other specifications) which are annexed hereto and made a part hereof, and are to be applicable for the duration of the contract, except as they may later be amended by mutual agreement.

This Agreement shall be for the period commencing July 1, 2022 through June 30, 2025. The term may be extended for up to two additional years as specified in the Invitation for Bid and at the prices bid by the Contractor.

The Districts’ agree to pay the Contractor said consideration in monthly payments, as per the specification, for services rendered under the Contract based upon the yearly contract price per route, September through June, upon satisfactory performance of said service on all days when schools are in session and transportation is furnished.

The Contractor agrees to comply with all the Massachusetts statutes applicable to the transportation of school children and any failure to comply with such statutes shall be deemed to be a breach of this Contract.

The said Contractor expressly warrants that said vehicles used by it in the performance of this Contract shall be fit for the purpose for which they are intended and shall be free from all defects and that the drivers operating these vehicles shall be duly licensed and capable of performing the duties required herein.

Each and every provision of law and clause required by law to be inserted in the Contract shall be deemed to be inserted herein and the Contract shall be read and enforced as though it were included herein and if through mistake or otherwise any such provision is not inserted, or it is not correctly inserted, then upon application of either party the Contract shall forthwith be physically amended to make such insertion.

This Contract shall not be assigned nor any part thereof be sublet without the written consent of the Sudbury Public Schools and the Lincoln Sudbury Regional High School, acting by and through their School Committees.

IN WITNESSETH WHEREOF, the parties hereto have executed this Agreement on this day and year first above written.

SUDBURY PUBLIC SCHOOLS

By _____

Xxxxxxxx, Chair

LINCOLN SUDBURY REGIONAL SCHOOL DISTRICT

By _____

Xxxxxxxx, Chair

CONTRACTOR

By _____

Company Name _____

By _____

Title _____

APPENDIX A-1 TRANSPORTATION CONTRACT - ATHLETICS & LATE BUS TRIPS

THIS AGREEMENT is made this day of _____ in the year ____ by and between the Sudbury Public Schools, having a usual place of business of 40 Fairbank Road, Sudbury, Massachusetts and the Lincoln Sudbury Regional High School, duly organized under the laws of Massachusetts and having a usual place of business at 390 Lincoln Road, hereinafter referred to as the “Districts”, and ____, having a usual place of business at _____, hereinafter referred to as the “Contractor.”

WITNESSETH, as follows, that the Contractor agrees to furnish athletic and late bus transportation and deliver for the Sudbury Public Schools and the Lincoln Sudbury Regional High School, pupils attending the schools from such places and at such times and for such considerations as is set forth in the Transportation Specifications dated November 15, 2021 (Invitation to Bid, Bid Forms, and other specifications) which are annexed hereto and made a part hereof, and are to be applicable for the duration of the contract, except as they may later be amended by mutual agreement.

This Agreement shall be for the period commencing July 1, 2022 through June 30, 2025. The term may be extended for up to two additional years as specified in the Invitation for Bid and at the prices bid by the Contractor.

The Districts’ agree to pay the Contractor said consideration in monthly payments, as per the specification, for services rendered under the Contract based upon the yearly contract price per route, September through June, upon satisfactory performance of said service on all days when schools are in session and transportation is furnished.

The Contractor agrees to comply with all the Massachusetts statutes applicable to the transportation of school children and any failure to comply with such statutes shall be deemed to be a breach of this Contract.

The said Contractor expressly warrants that said vehicles used by it in the performance of this Contract shall be fit for the purpose for which they are intended and shall be free from all defects and that the drivers operating these vehicles shall be duly licensed and capable of performing the duties required herein.

Each and every provision of law and clause required by law to be inserted in the Contract shall be deemed to be inserted herein and the Contract shall be read and enforced as though it were included herein and if through mistake or otherwise any such provision is not inserted, or it is not correctly inserted, then upon application of either party the Contract shall forthwith be physically amended to make such insertion.

This Contract shall not be assigned nor any part thereof be sublet without the written consent of the Sudbury Public Schools and the Lincoln Sudbury Regional High School, acting by and through their School Committees.

IN WITNESSETH WHEREOF, the parties hereto have executed this Agreement on this day and year first above written.

SUDBURY PUBLIC SCHOOLS

By _____

Xxxxxxxx, Chair

LINCOLN SUDBURY REGIONAL SCHOOL DISTRICT

By _____

Xxxxxxxx, Chair

CONTRACTOR

By _____

Company Name _____

By _____

Title _____

Appendix B – School Calendar

Sudbury Public Schools

2021-2022 School Calendar

July '21 (0)						
Su	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

August '21 (0)						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

September '21 (19)						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

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

November '21 (19)						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

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

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

February '22 (15)						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

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

April '22 (15)						
Su	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

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

June '22 (12/17)						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

- School Closed/ Holidays
- Teacher in-Service Day (no school for students)
- Early Release
- First and Last Day of School

Appendix C – Prevailing Wage



THE COMMONWEALTH OF MASSACHUSETTS EXECUTIVE OFFICE OF LABOR AND WORKFORCE DEVELOPMENT DEPARTMENT OF LABOR STANDARDS

Prevailing Wage Rates

As determined by the Director under the provisions of the
Massachusetts General Laws, Chapter 149, Sections 26 to 27H

RONALD L. WALKER, II
Secretary
WILLIAM D. MCKENNEY
Director

Awarding Authority: Sudbury Public School Committee and the Lincoln
Contract Number: 17-01 **City/Town:** SUDBURY
Description of Work: Provide student transportation for two school districts - Sudbury Public Schools and Lincoln Sudbury Regional School District
Job Location: 40 Fairbank Road

Information about Prevailing Wage Schedules for Awarding Authorities and Contractors

- This wage schedule applies only to the specific project referenced at the top of this page and uniquely identified by the "Wage Request Number" on all pages of this schedule.
- An Awarding Authority must request an updated wage schedule from the Department of Labor Standards ("DLS") if it has not opened bids or selected a contractor within 90 days of the date of issuance of the wage schedule. For CM AT RISK projects (bid pursuant to G.L. c.149A), the earlier of: (a) the execution date of the GMP Amendment, or (b) the bid for the first construction scope of work must be within 90-days of the wage schedule issuance date.
- The wage schedule shall be incorporated in any advertisement or call for bids for the project as required by M.G.L. c. 149, § 27. The wage schedule shall be made a part of the contract awarded for the project. The wage schedule must be posted in a conspicuous place at the work site for the life of the project in accordance with M.G.L. c. 149 § 27. The wages listed on the wage schedule must be paid to employees performing construction work on the project whether they are employed by the prime contractor, a filed sub-bidder, or any sub-contractor.
- All apprentices working on the project are required to be registered with the Massachusetts Department of Labor Standards, Division of Apprentice Standards (DLS/DAS). Apprentice must keep his/her apprentice identification card on his/her person during all work hours on the project. An apprentice registered with DAS may be paid the lower apprentice wage rate at the applicable step as provided on the prevailing wage schedule. **Any apprentice not registered with DLS/DAS regardless of whether or not they are registered with any other federal, state, local, or private agency must be paid the journeyworker's rate for the trade.**
- The wage rates will remain in effect for the duration of the project, except in the case of multi-year public construction projects. For construction projects lasting longer than one year, awarding authorities must request an updated wage schedule. Awarding authorities are required to request these updates no later than two weeks before the anniversary of the date the contract was executed by the awarding authority and the general contractor. For multi-year CM AT RISK projects, awarding authority must request an annual update no later than two weeks before the anniversary date, determined as the earlier of: (a) the execution date of the GMP Amendment, or (b) the execution date of the first amendment to permit procurement of construction services. Contractors are required to obtain the wage schedules from awarding authorities, and to pay no less than these rates to covered workers. The annual update requirement is not applicable to 27F "rental of equipment" contracts.
- Every contractor or subcontractor which performs construction work on the project is required to submit weekly payroll reports and a Statement of Compliance directly to the awarding authority by mail or email and keep them on file for three years. Each weekly payroll report must contain: the employee's name, address, occupational classification, hours worked, and wages paid. Do not submit weekly payroll reports to DLS. A sample of a payroll reporting form may be obtained at <http://www.mass.gov/dols/pw>.
- Contractors with questions about the wage rates or classifications included on the wage schedule have an affirmative obligation to inquire with DLS at (617) 626-6953.
- Employees not receiving the prevailing wage rate set forth on the wage schedule may report the violation to the Fair Labor Division of the office of the Attorney General at (617) 727-3465.
- Failure of a contractor or subcontractor to pay the prevailing wage rates listed on the wage schedule to all employees who perform construction work on the project is a violation of the law and subjects the contractor or subcontractor to civil and

Issue Date: 11/08/2016

Wage Request Number: 20161104-024

Classification	Effective Date	Base Wage	Health	Pension	Supplemental Unemployment	Total Rate
School Bus						
Athletic/ Field Trips/ Extra-Curricular <i>SCHOOL BUS - 25/EASTERN-8751/FIRST STUDENT</i>	09/01/2016	\$16.68	\$-	\$0.00	\$0.00	\$16.68
School Bus Driver						
<i>SCHOOL BUS - 25/EASTERN-8751/FIRST STUDENT</i>	09/01/2016	\$24.75	\$-	\$0.00	\$0.00	\$24.75

Additional Apprentice Information:

Minimum wage rates for apprentices employed on public works projects are listed above as a percentage of the pre-determined hourly wage rate established by the Commissioner under the provisions of the M.G.L. c. 149, ss. 26-27D. Apprentice ratios are established by the Division of Apprenticeship Training pursuant to M.G.L. c. 23, ss. 11E-11L.

All apprentices must be registered with the Division of Apprenticeship Training in accordance with M.G.L. c. 23, ss. 11E-11L.

All steps are six months (1000 hours.)

Ratios are expressed in allowable number of apprentices to journeymen or fraction thereof, unless otherwise specified.

** Multiple ratios are listed in the comment field.

*** APP to JM, 1:1, 2:2, 2:3, 3:4, 4:4, 4:5, 4:6, 5:7, 6:7, 6:8, 6:9, 7:10, 8:10, 8:11, 8:12, 9:13, 10:13, 10:14, etc.

**** APP to JM, 1:1, 1:2, 2:3, 2:4, 3:5, 4:6, 4:7, 5:8, 6:9, 6:10, 7:11, 8:12, 8:13, 9:14, 10:15, 10:16, etc.

APPENDIX D - ROSTER OF PROPOSED BUS DRIVERS

1. Name _____ Telephone _____

Address _____

Lic # _____

2. Name _____ Telephone _____

Address _____

Lic # _____

3. Name _____ Telephone _____

Address _____

Lic # _____

4. Name _____ Telephone _____

Address _____

Lic # _____

5. Name _____ Telephone _____

Address _____

Lic # _____

6. Name _____ Telephone _____

Address _____

Lic # _____

7. Name _____ Telephone _____

Address _____

Lic # _____

8. Name _____ Telephone _____

Address _____

Lic # _____

9. Name _____ Telephone _____

Address _____

Lic # _____

10. Name _____ Telephone _____

Address _____

Lic # _____

11. Name _____ Telephone _____

Address _____

Lic # _____

12. Name _____ Telephone _____

Address _____

Lic # _____

13. Name _____ Telephone _____

Address _____

Lic # _____

14. Name _____ Telephone _____

Address _____

Lic # _____

15. Name _____ Telephone _____

Address _____

Lic # _____

16. Name _____ Telephone _____

Address _____

Lic # _____

17. Name _____ Telephone _____

Address _____

Lic # _____

18. Name _____ Telephone _____

Address _____

Lic # _____

19. Name _____ Telephone _____

Address _____

Lic # _____

20. Name _____ Telephone _____

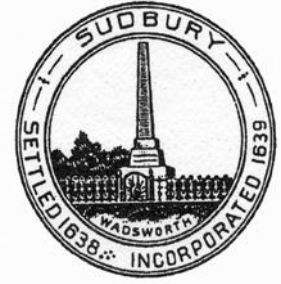
Address _____

Lic # _____

School Transportation Bid

IFB: #21-001 Addendum 1

November 29, 2021



Sudbury Public Schools and Lincoln-Sudbury Regional High School

ADDENDUM 1

Sudbury Public Schools

40 Fairbank Road
Sudbury, MA 01776
(978) 443-1058

www.sudbury.k12.ma.us

Lincoln-Sudbury Regional High School

390 Lincoln Road
Sudbury, MA 01776
(978) 443-9961

www.lsrhs.net

Addendum 1 – IFB #21-001 – School Transportation

Section VI. EQUIPMENT (Page 9)

Strike the following language:

~~The bid proposal must include at least twenty-seven (27) buses at the start of the contract period.~~

Replace with:

The bid proposal must include at least thirty (30) buses at the start of the contract period.

Strike the following language:

No bus shall in any case be older than seven (7) years at the start of the contract year or have cumulative mileage in excess of **100,000 miles** at the start of the contract year. All buses must conform to all State and Federal regulations.

Replace with:

No bus shall in any case be older than seven (7) years at the start of the contract year or have cumulative mileage in excess of **150,000 miles** at the start of the contract year. All buses must conform to all State and Federal regulations.

Section VII. OPERATIONS (Page 12)

Strike the following language:

The Contractor shall see that all drivers have on file with the Contractor a report, made by a registered physician, that he/she is in sound physical condition and capable of performing the duties of a school bus driver. The physical examination certificate must be submitted once a year, as required by law. ~~In addition to annual physicals, all drivers shall have a chest x-ray each three (3) year period and such report is also filed.~~

APPENDIX C

Replace original Appendix C with the attached prevailing wage rates as determined by the Department of Labor Standards under the provisions of G.L. c. 71, §7A.



CHARLES D. BAKER
Governor

KARYN E. POLITO
Lt. Governor

THE COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF LABOR AND WORKFORCE DEVELOPMENT
DEPARTMENT OF LABOR STANDARDS

Prevailing Wage Rates

As determined by the Director under the provisions of the
Massachusetts General Laws, Chapter 149, Sections 26 to 27H

ROSALIN ACOSTA
Secretary
MICHAEL FLANAGAN
Director

Awarding Authority: Sudbury Public Schools
Contract Number: 21-001 **City/Town:** SUDBURY
Description of Work: Provide student transportation for two school districts - Sudbury Public Schools and Lincoln-Sudbury Regional High School
Job Location: 40 Fairbank Road, Sudbury, MA 01776

Information about Prevailing Wage Schedules for Awarding Authorities and Contractors

- This wage schedule applies only to the specific project referenced at the top of this page and uniquely identified by the “Wage Request Number” on all pages of this schedule.
 - An Awarding Authority must request an updated wage schedule from the Department of Labor Standards (“DLS”) if it has not opened bids or selected a contractor within 90 days of the date of issuance of the wage schedule. For CM AT RISK projects (bid pursuant to G.L. c.149A), the earlier of: (a) the execution date of the GMP Amendment, or (b) the bid for the first construction scope of work must be within 90-days of the wage schedule issuance date.
 - The wage schedule shall be incorporated in any advertisement or call for bids for the project as required by M.G.L. c. 149, § 27. The wage schedule shall be made a part of the contract awarded for the project. The wage schedule must be posted in a conspicuous place at the work site for the life of the project in accordance with M.G.L. c. 149 § 27. The wages listed on the wage schedule must be paid to employees performing construction work on the project whether they are employed by the prime contractor, a filed sub-bidder, or any sub-contractor.
 - All apprentices working on the project are required to be registered with the Massachusetts Department of Labor Standards, Division of Apprentice Standards (DLS/DAS). Apprentice must keep his/her apprentice identification card on his/her person during all work hours on the project. An apprentice registered with DAS may be paid the lower apprentice wage rate at the applicable step as provided on the prevailing wage schedule. **Any apprentice not registered with DLS/DAS regardless of whether or not they are registered with any other federal, state, local, or private agency must be paid the journeyworker's rate for the trade.**
 - The wage rates will remain in effect for the duration of the project, except in the case of multi-year public construction projects. For construction projects lasting longer than one year, awarding authorities must request an updated wage schedule. Awarding authorities are required to request these updates no later than two weeks before the anniversary of the date the contract was executed by the awarding authority and the general contractor. For multi-year CM AT RISK projects, awarding authority must request an annual update no later than two weeks before the anniversary date, determined as the earlier of: (a) the execution date of the GMP Amendment, or (b) the execution date of the first amendment to permit procurement of construction services. Contractors are required to obtain the wage schedules from awarding authorities, and to pay no less than these rates to covered workers. The annual update requirement is not applicable to 27F “rental of equipment” contracts.
 - Every contractor or subcontractor which performs construction work on the project is required to submit weekly payroll reports and a Statement of Compliance directly to the awarding authority by mail or email and keep them on file for three years. Each weekly payroll report must contain: the employee’s name, address, occupational classification, hours worked, and wages paid. Do not submit weekly payroll reports to DLS. A sample of a payroll reporting form may be obtained at <http://www.mass.gov/dols/pw>.
 - Contractors with questions about the wage rates or classifications included on the wage schedule have an affirmative obligation to inquire with DLS at (617) 626-6953.
 - Employees not receiving the prevailing wage rate set forth on the wage schedule may report the violation to the Fair Labor Division of the office of the Attorney General at (617) 727-3465.
 - Failure of a contractor or subcontractor to pay the prevailing wage rates listed on the wage schedule to all employees who perform construction work on the project is a violation of the law and subjects the contractor or subcontractor to civil and criminal penalties.
-

Classification	Effective Date	Base Wage	Health	Pension	Supplemental Unemployment	Total Rate
School Bus						
Athletic/ Field Trips/ Extra-Curricular <i>SCHOOL BUS - 170 TEAMSTERS/1st Student-SUDBURY</i>	09/01/2021	\$23.07	\$-	\$0.00	\$0.00	\$23.07
	09/01/2022	\$24.24	\$-	\$0.00	\$0.00	\$24.24
School Bus Driver <i>SCHOOL BUS - 170 TEAMSTERS/1st Student-SUDBURY</i>	09/01/2021	\$30.35	\$-	\$0.00	\$0.00	\$30.35
	09/01/2022	\$31.11	\$-	\$0.00	\$0.00	\$31.11

Additional Apprentices Information:

Minimum wage rates for apprentices employed on public works projects are listed above as a percentage of the pre-determined hourly wage rate established by the Commissioner under the provisions of the M.G.L. c. 149, ss. 26-27D. Apprentices ratios are established by the Division of Apprenticeship Training pursuant to M.G.L. c. 23, ss. 11E-11L.

All apprentices must be registered with the Division of Apprenticeship Training in accordance with M.G.L. c. 23, ss. 11E-11L.

All steps are six months (1000 hours.)

Ratios are expressed in allowable number of apprentices to journeymen or fraction thereof, unless otherwise specified.

** Multiple ratios are listed in the comment field.

*** APP to JM; 1:1, 2:2, 2:3, 3:4, 4:4, 4:5, 4:6, 5:7, 6:7, 6:8, 6:9, 7:10, 8:10, 8:11, 8:12, 9:13, 10:13, 10:14, etc.

**** APP to JM; 1:1, 1:2, 2:3, 2:4, 3:5, 4:6, 4:7, 5:8, 6:9, 6:10, 7:11, 8:12, 8:13, 9:14, 10:15, 10:16, etc.

Letter of Commitment for the ACT School Bus Advisory Services Program

Attn:

RE: Letter of Commitment to participate in the Massachusetts Clean Energy Center's Accelerating Clean Transportation ("ACT") School Bus Advisory Services Program.

Dear _____,

On behalf of Vermont Energy Investment Corporation ("VEIC") – in partnership with PowerOptions, Inc. ("PowerOptions") and Energetics, a division of Akimeka ("Energetics") – and funded by the Massachusetts Clean Energy Center ("MassCEC"), we are pleased to inform you that _____ (the "District") has been selected to participate in the ACT School Bus Advisory Services Program (the "Program"). This Letter ("Letter of Commitment") along with the General Terms and Conditions attached as Exhibit 1, provides an overview of the Program, and sets out the terms and conditions governing the District's participation in the Program. Each party to this Letter of Commitment is a "Party" and together are the "Parties".

Under the Program, VEIC (the "Consultant"), which is under contract with and paid by MassCEC, will work with the District to ultimately create and provide an individualized Final Fleet Electrification Plan and Final Fleet Electrification Plan Presentation (combined, the "Plan and Presentation"). To support this work, VEIC has subcontracted with PowerOptions and Energetics (each, "Partners"), which will lead and consult on specific elements of the Plan and Presentation. The Plan and Presentation will provide the District with a clear path to school bus electrification, and will include recommendations related to technical (i.e., vehicle and charging), financial, procurement, emissions, and stakeholder-related considerations. To perform this work, the Consultant, and its Partners, will be in direct contact with the District to request baseline fleet data information, conduct in-person site assessments, prepare a vehicle and charging needs assessment, and confirm and validate key assumptions along the way, all in support of the Plan and Presentation. The Consultant, and/or its Partners, may also request additional information from the District, contingent to the Scope of the Project.

By executing this Letter of Commitment, the District agrees to the following:

- i. The undersigned has the authority to sign on behalf of and commit the District to the terms and conditions contained in Exhibit 1;
- ii. The District will designate a main contact person (the "Project Manager") for the Program who will coordinate with the Consultant, its Partners, and MassCEC as needed and commits to dedicating between 25-40 total hours over the course of the project;
- iii. The Project Manager will: (i) participate in the Fleet Kickoff Meeting, project meetings (as needed) and Quarterly Meetings with the Consultant, its Partners, MassCEC, and other relevant stakeholders; (ii) collaborate with the Consultant, and/or its Partners, to identify and acquire key information necessary to complete the Final Fleet Electrification Plan and Presentation, including documents, data, and other information as may be specified; (iii) support in-person site assessments with the Consultant, and its Partners; and (iv) discuss results of the assessment with

- key Project stakeholders such as municipal decision-makers, school boards, and/or school committees.
- iv. Once this Letter of Commitment is signed and received by the Consultant and MassCEC has approved participation the District will be enrolled in the Program, and invited to a Fleet Kickoff Meeting with all relevant stakeholders and Project partners. The target date for the Fleet Kickoff Meeting will be within two (2) weeks of the signed Letter of Commitment.
 - v. The District will complete a Data Collection Template, provided by the Consultant or its Partners, which will provide baseline fleet assessment data including, but not limited to: fleet size and makeup, annual and maximum daily miles traveled, odometer reading(s), historical energy use and recent utility bills, routes data and schedules, daily and seasonal operations, current fuel types and costs, vehicle and maintenance costs, baseline emission estimates (if available), depot location(s) and ownership status, ownership model and preference, fleet decision making processes and municipal approval processes, anticipated timing of vehicle replacement or retirement. The Project Team anticipates it will likely take the District one (1) month to complete the Data Collection Template. Once submitted, the Consultant and its Partners anticipate beginning analysis **one (1) month** from the submittal date. This is an estimate, based on the current queue, ongoing studies, and resources available as of the date of this Letter of Commitment. The Consultant team will communicate any scheduling changes to the District and will be available to answer any questions the District may have.
 - vi. The District will lead efforts to engage with all relevant stakeholders (e.g., local utility, school district officials, third party fleet operators, etc.) over the course of the project with support for and participation in this engagement by the Consultant and/or its Partners;
 - vii. The District will ensure that all the information provided to the Consultant, and/or its Partners, as part of the Program is accurate and complete to the best of its knowledge;
 - viii. The District will review draft materials and provide feedback in a timely manner;
 - ix. The District is responsible for ensuring that it has the appropriate permission and rights to share any information or data provided to the Consultant and/or its Partners. The District represents that none of the data or information it shares will either (i) be subject to any confidentiality, privacy, or proprietary restrictions that would restrict Consultant's or its Partners' use of such information, or (ii) constitute "Personal Information" under 201 CMR 17.00 or applicable law or regulation. The District accepts responsibility for all information or data it provides to Consultant and/or its Partners, and will notify Consultant and/or its Partners if it has information that would require separate confidentiality or privacy restrictions prior to sharing, and will not do so without express written consent of Consultant and (if applicable) execution of a separate confidentiality agreement. At no time will the District share any confidential data or information directly with MassCEC.
 - x. In exchange for the District's cooperation and participation in the Program, the Consultant will deliver the Plan and Presentation produced under the Program and reviewed by MassCEC to the District, which will constitute the final consideration to be provided to the District under this Letter of Commitment. The District will not be entitled to any further assistance from the Consultant or MassCEC in connection with its participation in the Program;
 - xi. A public version of the Plan and Presentation provided by the Consultant may be made publicly available by MassCEC and, therefore, the Consultant shall ensure the Plan and Presentation do not contain information confidential to the District;
 - xii. The District agrees and acknowledges that with regard to any report or recommendation made by the Consultant under the Program: (i) the data, findings, recommendations of any such report are solely those of the Consultant and shall not be attributed in any way to MassCEC or any of its

- directors, officers, employees, agents and representatives; (ii) MassCEC has not verified the accuracy, completeness or veracity of any such data, conclusions and recommendations of any such report or recommendation; and (iii) MassCEC has not made any representations and warranties or guarantees of any nature or kind with respect to the findings, conclusions, opinions, recommendations of the content of any such report and/or recommendation; and
- xiii. The District will work cooperatively with the Consultant, its Partners and MassCEC per scope and schedule.

Project Managers and Key Points of Contact:

For VEIC:

Brian Picariello, Senior Consultant, BPicariello@veic.org
Kate Cahalane, Energy Services Division Project Manager, Kcahalane@veic.org

For PowerOptions:

Anna Brackenhofer, Energy Program Analyst, abrackenhofer@poweroptions.org

For Energetics:

Ewan Pritchard, Sustainable Transportation Consultant, egpritchard@energetics.com

For District:

Name:

Title:

Email:

- xiv. The District may, at its sole discretion, direct Consultant and/or its Partners to work with a third party (such as a third party operator or service provider to the District) (hereafter, "Third Party") as part of its participation in the Program. In the event a Third Party is identified, the District agrees to identify it in the additional signature block below, and to instruct such Third Party of its election to participate in the Program and to provide such information as may be required or requested by Consultant and/or its Partners in order to perform its obligations under the Program. Third Party agrees, by signing this Letter of Commitment, to support the District's participation in the Program by fulfilling any of the applicable obligations of the District set forth herein, specifically including (but not limited to) providing relevant data and information to Consultant and/or its Partners. By signing this Letter of Commitment, Third Party agrees to be bound by the same duties and obligations of the District contained in this Letter of Commitment, including, without limitation, the terms and conditions set forth in Exhibit 1.

This Letter of Commitment may be executed in two or more counterparts, and by different parties hereto on separate counterparts, each of which will be deemed an original, but all of which together will constitute one and the same instrument.

All conditions, covenants, duties and obligations contained in this Letter of Commitment may be

amended only through a written amendment signed by the District and VEIC. The Parties understand and agree that this Letter of Commitment supersedes all other verbal and written agreements and negotiations by the parties regarding the Program set forth herein.

If you accept these terms, as well as the General Terms and Conditions listed in Exhibit 1, please sign below. This Letter of Commitment shall be effective as of your signature for one year.

Accepted & Agreed

By: Vermont Energy Investment Corporation
(VEIC)

Printed Name: _____ By: _____

Title: Andres Achury

Date: _____ Director, Clean Transportation

OPTIONAL: If a Third Party is identified pursuant to section (xiv) of the Agreement:

By: _____ (Entity Name)

Signature

Printed Name: _____

Title: _____

Date: _____

EXHIBIT 1: General Terms and Conditions

1) Publicity; Use of Name

a) District shall collaborate directly with VEIC to prepare any public statement, media strategy or announcement relating to or bearing on the work performed or data collected under this Letter of Commitment or to prepare any press release or for any news conference in which MassCEC is concerned or discussed (each, a “Public Statement”) and shall in no event be permitted to publish, release, or otherwise disseminate any such Public Statement without VEIC’s and MassCEC’s prior written consent. In addition to the foregoing, Public Statements include any media pitches, interviews, embargoed materials, photo opportunities, blogs, guest columns, media events or editorial boards which relate to this Letter of Commitment or MassCEC.

b) District agrees that MassCEC, shall have the right to make use of and disseminate, in whole or in part, the anonymous, aggregated, Plan and Presentation described herein, and to use the information therein contained to produce summaries, case studies, or similar information resources.

2) Termination

Either party may terminate this Letter of Commitment at any time for a material breach of any term of the Letter of Commitment; in the event that VEIC terminates this Letter of Commitment, the District shall no longer be permitted to participate in the Program. VEIC and the District acknowledge that VEIC shall notify MassCEC of any material breach of this Letter of Commitment and VEIC shall obtain MassCEC’s written consent prior to terminating this Letter of Commitment.

3) Indemnification; Limitation of Liability

a) Each Party shall assume full liability for its own acts of negligence or willful misconduct in the performance of its obligations under this Letter of Commitment, and shall, to the extent permitted under applicable law, assume full financial and legal liability for all expenses, including reasonable attorneys’ fees, resulting from or attributable to any such negligence or omission of its employees, officers, directors, and agents with respect to their failure to adhere to the terms of this Letter of Commitment.

b) In no event shall either Party be liable for any indirect, incidental, special, punitive, or consequential damages whatsoever (including but not limited to lost profits or interruption of business) arising out of or related to the District’s performance of the Program under this Letter of Commitment.

c) The Consultant is an independent contractor and in no event shall any of the MassCEC, the Commonwealth, and each of their respective officers, directors, employees, agents, and assigns be liable to the District or any other party on account of any liability, loss, claims, damages, fines, penalties, costs, expenses (including reasonable attorneys’ fees), judgments and awards sustained, incurred or suffered by or imposed up the District or any of its agents, officers, directors, employees or subcontractors arising out of or in connection with any act or omission of the Consultant or its Partners.

4) Public Records

As a public entity, MassCEC is subject to Massachusetts' Public Records Law, codified at Chapter 66 of the Massachusetts General Laws. Thus, any documentary material, data, or other information received by MassCEC from the District is a public record subject to disclosure. District acknowledges and agrees that MassCEC, in its sole discretion, shall determine whether any particular document, material, data or other information in MassCEC's possession is exempt from or subject to public disclosure. *District agrees and acknowledges that it shall not send directly to MassCEC any confidential or sensitive information under this Letter of Commitment or otherwise in relation to the Program.*

5) Choice of Law and Forum; Arbitration; Equitable Relief

a) This Letter of Commitment and the rights and obligations of the parties hereunder shall be governed by and construed in accordance with the laws of the Commonwealth of Massachusetts, without giving effect to the conflict of laws principles thereof. Any dispute arising out of or relating to this Letter of Commitment or the breach, termination or invalidity hereof, whether before or after termination hereof, if not resolved by negotiation among the parties within thirty (30) days after such dispute is raised by either Party in writing, will be settled by binding arbitration by a single arbitrator in accordance with the Commercial Arbitration Rules of the American Arbitration Association then in effect, and judgment upon the award rendered by the arbitrator may be entered in any court having jurisdiction over this Letter of Commitment. Any such arbitration will be conducted in or near Boston, Massachusetts. The prevailing Party shall be entitled to receive from the other Party its reasonable attorney's fees and costs incurred in connection with any action, proceeding or arbitration hereunder.

b) This section shall not be construed to limit any other legal rights of the Parties. Each Party acknowledges and agrees that any breach or threatened breach of this Letter of Commitment by the other Party may result in substantial, continuing and irreparable damage to the first Party. Therefore, before or during any arbitration, either Party may apply to a court having jurisdiction for a temporary restraining order or preliminary injunction, where such relief is necessary to protect its interests pending completion of the arbitration proceedings.

6) Independent Status

Nothing in this Letter of Commitment will be construed or deemed to create a relationship of employer and employee, partner, joint venture, or principal and agent between the parties hereto, their employees, agents, or officers.

7) Compliance with Law

District agrees to comply with all applicable federal, state, and local statutes, rules, regulations, and permitting requirements, including, but not limited to, all laws promoting fair employment practices or prohibiting employment discrimination and unfair labor practices, and shall not discriminate in the hiring of any applicant for employment nor shall any qualified employee be demoted, discharged, or otherwise subject to discrimination in the tenure, position, promotional opportunities, wages, benefits, or terms and conditions of their employment because of race, color, national origin, ancestry, age, sex, religion, disability, handicap, sexual orientation, gender identity, or for exercising any rights afforded by law.

8) Waivers

Conditions, covenants, duties, and obligations contained in this Letter of Commitment may be waived only by written agreement between the Parties. Forbearance or indulgence in any form or manner by a party shall not be construed as a waiver, nor in any way limit the remedies available to that Party.

9) Third Party Beneficiaries

This Letter of Commitment shall be binding on the parties hereto and their respective successors and permitted assigns and shall inure to the benefit of the parties and their respective successors and assigns. Nothing in this Letter of Commitment shall be construed to create any rights or obligations except between the parties, and no person shall be regarded as a third party beneficiary of this Letter of Commitment; provided, however, that the parties hereto acknowledge that MassCEC, the Commonwealth, and their respective officers, directors, employees, agents, and assigns are intended third-party beneficiaries under this Letter of Commitment, and that MassCEC shall have the right to enforce all provisions of this Letter of Commitment that are applicable to MassCEC.