



AGENDA and NOTICE SCHOOL COMMITTEE MEETING

Regular Session Meeting
Monday, September 14, 2026

LOCATION
40 Fairbank Road, Sudbury, MA 01776; Room 214
Dial In: 1 301 715 8592 - Webinar ID: 825 4840 5260
Live Link: <https://us02web.zoom.us/j/82548405260>

AGENDA

7:00 p.m. - Open Regular Session

(Approximate)

- | | | |
|--|---------------------|---------|
| 1. 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. | | |
| 2. Educational and Operational Matters | (Reports) | 15 Mins |
| a. SEA (Melissa Morabito) | | |
| b. District Reports | | |
| i. Acting Director of Business and Human Resources | | |
| ii. Interim Assistant Superintendent | | |
| iii. Interim Superintendent | | |
| 3. Consent Calendar | (Discussion/Action) | 5 Mins |
| a. Community Preservation Committee Request | | |
| b. Metrowest Grant Approval | | |
| c. Budget Revision Request for MSBA Approved Funds | | |
| 4. Business and Policy Matters | | |
| a. Combined Facilities Director | (Report) | 10 Mins |
| i. Haynes and Nixon Roof Projects Update | | |
| b. Interim Superintendent Entry Plan & Goals / Becky McFall Introduction | (Discussion/Action) | 15 Mins |
| c. Review District Strategic Plan and District Goals | (Discussion/Action) | 15 Mins |
| d. School Committee Workshop - School Committee Goals | (Discussion/Action) | 60 Mins |
| e. Delegate Communications Liaison to write letter to Carmine Gentile | (Discussion/Action) | 5 Mins |
| f. Superintendent Search Updates | (Discussion/Action) | 10 Mins |
| g. Policy BDB: Step 1: Informational Only | (Discussion) | 5 Mins |
| i. JLCD Administration of Medication of Students | | |
| ii. JLCDC Self Administration and Self-Carry of Medication | | |
| iii. JKAA Prevention of Physical Restraint of Students | | |
| iv. ACL PROTECT Act | | |
| 5. Future Agenda Items | (Report) | 5 Mins |
| 6. 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, September 28, 2026***

**Sudbury Public Schools
School Committee Meeting**

Date: September 14, 2026

Agenda Item: 3 - Consent Calendar

- a. Community Preservation Committee Request
- b. Metrowest Grant Approval
- c. Budget Revision Request for MSBA Approved Funds

Recommendation:

Motion to approve the consent calendar as presented/amended.

Background / Preparation Information:

- a. Community Preservation Committee Request – Sandra Duran would like to send a request for monies to the CPC to fix the Haynes playground. Please review the documents and bring any questions.
- b. Metrowest Grant Approval – Betsy Grams received a grant \$10,000 from the Metrowest Grant which we need to approve. Please review the information and bring any questions.
- c. Budget Revision Request for MSBA Approved Funds – Sandra Duran has sent a revision to the MSBA approved funds for the projects at Haynes and Nixon. Please review the paperwork and bring any questions.

Attachments:

- 1-2026-Josiah Haynes Playground CPA-Application-Form-260903-with shade structure
- 2-FY28 DRAFT SPS CPC Haynes Playground presentation with shade structure.pptx
- 3-Haynes Playground CPC Application questions and answers with shade structure.docx
- 4-Haynes_Playground_CPA_School_Committee_Memo_Budget with shade structure.docx
- 5-Kimberly Horn Haynes Parking Lot Recommendation map Attachment 1 - Map of Maintenance & Rehabilitation Recommendations by Town Lot
- 6-Surface America Haynes Elementary Quote - Sudbury, MA
- 7-SC Memo MWHF Grant \$10,000 for 9-14-26 (1)
- 8-BRR_MSBA_1
- 9-BRR_MSBA_2

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

TOWN OF SUDBURY COMMUNITY PRESERVATION COMMITTEE



Guidelines for Project Submission

- 1) Applications are due no later than noon on the second Monday of September and should be submitted as an electronic PDF file using this application form.
*Paper applications mailed to the address below must be received before the deadline.
- 2) Projects should be consistent with the Town's Master Plan, Fields Needs Assessment, Open Space and Recreation Plan, Historic Preservation Plan, Town-wide Comprehensive Facility Study, Housing Production Plan, and other planning documents that have received wide scrutiny and input and have been adopted by the Town;
- 3) Requests must include a statement of need and be documented with appropriate supporting information. The use of maps, visual aids, and other supplemental information is encouraged.
- 4) Applications should provide examples estimates, quotes, and such other evidence to document project scope.
- 5) The use of visual aids such as maps, photographs and other supplemental information is encouraged
- 6) Describe the endorsement, support, or other recommendations, if any, received by Town Boards, Committees, Commissions, or Departments.
- 7) Recipients of CPA funding must submit an annual project report to the Director of Planning by October 15 of each year following the year approved until the project is deemed complete.
- 8) Applicants must attend a Community Preservation Committee meeting to present and answer questions. The meeting schedule has been announced and is posted on the Town's website.
- 9) Grant recipients are required to acknowledge the Community Preservation Act in press releases, publicity materials, news, and written or oral announcements. The CPC requires signage in the form of a sign or plaque affixed on or adjacent to CPA-funded work when possible. The CPC will fund and supply the signage in consultation with the Applicant.
- 10) The CPC may impose a completion date by which time the project must be completed and all invoices paid (Applications for housing are exempted from this requirement). The completion date shall be agreed upon by the Applicant and the CPC. If the project faces delays, the Applicant should promptly notify the CPC with an explanation and a request for a new completion date. The CPC may agree to extend the completion date. If the completion date is not extended, the CPC may submit an article to revert the allocation.

There are legal limitations on the use of Community Preservation Act funds. Additional information can be found on the Community Preservation Coalition website at: <https://www.communitypreservation.org>

If you are in doubt about your project's eligibility after consulting these resources, you are encouraged to submit an application so the Community Preservation Committee can determine eligibility.

Please submit the Project Submission Form and accompanying documentation to:

Ryan Poteat, Community Preservation Coordinator
c/o Planning and Community Development Department
Flynn Building 278 Old Sudbury Road
Sudbury, MA 01776
PoteatR@sudbury.ma.us

Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants.



COMMUNITY PRESERVATION ACT

Town of Sudbury

Application for CPA Funding

Please email PDF application to:
PoteatR@sudbury.ma.us

Applications may also be dropped off or mailed to:
Community Preservation Coordinator
278 Old Sudbury Road, Sudbury, MA 01776

Project Title Haynes Playground & Adjacent Pavement Area Resurfacing **Date Submitted** _____

Applicant/Contact Person (please print) Sandra R. Duran

Signature _____

Staff person/Responsible party Sandra R. Duran

Email Sandra_Duran@sudbury.k12.ma.us **Telephone** 978-405-4753

Estimated Completion Date August 30, 2028

Total Cost of Project \$530,000.00 **CPA Funds Requested** \$530,000.00

CPA Eligibility (refer to the chart on page 4)

Please select the category and purpose of your project:

CPA Category:

- ☐ Community Housing
- ☐ Historic Preservation
- ☒ Open Space & Recreation

CPA Purpose:

- ☐ Acquisition
- ☐ Creation
- ☐ Preservation
- ☐ Support
- ☒ Rehabilitation & Restoration

For more information of the factors and considerations used by the Community Preservation Committee used to prioritize projects, please refer to the General Considerations summary (on pages 5-6).

<https://sudbury.ma.us/cpc/>

PROJECT DESCRIPTION: Provide answers to the questions listed below. A complete application must provide all relevant requested information. Include supporting materials and exhibits as needed.

1. Goals: What are the specific objectives of the proposed project? Who will benefit and how?

The goal of the proposed project is to rehabilitate the deteriorated playground surfacing and adjacent pavement at the Josiah Haynes Elementary School and install a new shade structure to create a safe, accessible, durable, climate-resilient, and inclusive outdoor recreation area that complies with current safety and accessibility standards. Specific objectives include fully removing and replacing the failed poured-in-place safety surfacing, providing an overlay of the deteriorated adjacent asphalt pavement, investigating underlying subsurface conditions and improving drainage where necessary, eliminating uneven surfaces and tripping hazards, improving accessibility, and restoring safe and reliable access to the playground equipment and surrounding play areas. The project will also include the installation of a shade structure over a portion of the playground. As Massachusetts experiences rising average temperatures and more frequent periods of extreme heat, providing shade at outdoor recreational facilities is increasingly important. The shade structure will provide students with relief from direct sunlight and high surface temperatures, creating a more comfortable outdoor environment and increasing opportunities for safe playground use during warmer weather. In addition to benefiting playground users, reducing prolonged direct sunlight and ultraviolet exposure to the new poured-in-place surfacing is expected to reduce heat and weather-related deterioration and help extend the useful life of the Town's investment in the new safety surface. The project will primarily benefit Haynes Elementary School students, including children with disabilities and mobility limitations, by providing a safer, more accessible, comfortable, and inclusive environment for physical activity, social interaction, and outdoor learning. It will also benefit school staff, families, youth organizations, and members of the broader Sudbury community who use the playground outside of school hours. By fully replacing the failed poured-in-place surfacing, overlaying the adjacent pavement, addressing underlying drainage conditions where necessary, and incorporating a shade structure in response to increasingly warmer conditions, the project will preserve and enhance an important community recreational asset, expand opportunities for inclusive play, improve climate resiliency, protect the Town's capital investment, and reduce the need for repeated short-term repairs.

2. Community Need: Why is this project needed? Does it address needs identified in existing Town or regional plan, by committees/board, or needs raised in community discussions? Will the project serve multiple needs or populations?

The Josiah Haynes Elementary School playground is an important recreational resource serving students, families, and the broader Sudbury community. The existing asphalt and poured-in-place safety surfaces have failed and require complete replacement. Their deteriorated condition creates uneven surfaces, potential tripping hazards, accessibility concerns, and limitations on the safe use of the playground. Continued temporary repairs would not address the underlying deterioration or provide a reliable long-term solution.

The project responds to the Town ' s ongoing need to maintain safe, accessible, and inclusive public recreational facilities and to protect its investment in existing community assets. It supports established municipal priorities related to public safety, accessibility, preventive capital maintenance, and the preservation of outdoor recreation opportunities. The project also responds to concerns raised by school personnel, families, and community members regarding the condition and continued usability of the playground.

The improvements will serve multiple needs and populations. During the school day, the playground supports physical education, outdoor learning, recess, social development, and the physical and emotional well-being of Haynes Elementary School students. Outside school hours, it is available to families, neighborhood residents, youth organizations, and other members of the Sudbury community. Replacement of the poured-in-place surface will be particularly important for children and visitors with disabilities by improving access to playground equipment and creating a safer, more inclusive environment.

By replacing both failed surfaces as one coordinated project, the Town will restore the playground ' s safety and usability, improve accessibility, reduce the need for repeated short-term repairs, and preserve a valuable community recreation resource for Sudbury ' s current and future residents.

3. Community Support: Which Town Boards/Committees/Departments or community organizations have you consulted/collaborated.

The Combined Facilities Department has consulted and collaborated with the Sudbury School Committee regarding the condition of the Josiah Haynes Elementary School playground and the need to replace the failed asphalt and poured-in-place safety surfaces. The Combined Facilities Department is responsible for evaluating the existing conditions, developing the proposed scope of work, coordinating cost and project information, and preparing the Community Preservation Act funding application. The School Committee supports efforts to restore the playground as a safe, accessible, inclusive, and durable recreational resource for students, families, and the broader Sudbury community.

4. Budget: What is the total budget for the project and how will CPA funds be spent? Provide written estimates to substantiate proposed costs. Include a multi-year budget, if appropriate. (NOTE: CPA funds may NOT be used for general maintenance purposes.)

4. Budget: What is the total budget for the project and how will CPA funds be spent? Provide written estimates to substantiate proposed costs. Include a multi-year budget, if appropriate. The total estimated project budget is \$530,269.19, and the School is requesting CPA funding for the full project cost. CPA funds will be used for the comprehensive capital rehabilitation of the Josiah Haynes Elementary School playground and adjacent pavement area, including the complete replacement of the failed poured-in-place safety surfacing, site work and drainage improvements, an asphalt overlay of the adjacent pavement, and installation of a new shade structure. CPA funds will be used exclusively for eligible capital improvements and will not be used for routine or general maintenance. The estimated project costs are:
Project Component Estimated Cost
Poured-in-place playground surface replacement \$230,539.00
Site work/drainage improvements \$50,000.00
Pavement overlay — 1,436 SY at \$79/SY \$117,700.00
Shade structure \$50,000.00
Construction Subtotal \$438,239.00
Construction contingency — 15% \$65,735.85
Subtotal including contingency \$503,974.85
Escalation — 6% \$26,294.34
Total Estimated Project Cost \$530,269.19
The 15% construction contingency is appropriate because demolition of the severely degraded existing poured-in-place safety surfacing may reveal concealed subgrade deterioration, inadequate drainage, or other subsurface conditions that will need to be addressed before installation of the new surface. The contingency provides sufficient flexibility to correct these presently unknown conditions and help ensure the long-term performance of the new playground surfacing. The 6% escalation allowance accounts for anticipated construction-cost increases between preparation of the estimate and project implementation. The \$50,000 shade structure allowance will support the installation of a permanent shade structure within the playground area. In addition to providing students and other playground users with relief from direct sunlight and elevated temperatures, the shade structure will reduce direct solar and ultraviolet exposure to portions of the new poured-in-place safety surfacing, helping protect the Town's investment and extend the useful life of the new surface. The proposed work represents a comprehensive capital improvement rather than routine maintenance. The project will fully replace the failed poured-in-place safety surfacing, rehabilitate the adjacent asphalt pavement through an overlay, investigate and address subsurface and drainage deficiencies as necessary, improve accessibility and safety, provide shade in response to increasingly warmer conditions, and extend the useful life and usability of this important school and community recreational asset. The project is currently anticipated as a single-phase undertaking; therefore, a multi-year budget is not proposed. The requested CPA funding amount is \$530,000.00.

5. Funding: What other funding sources are committed or under consideration? Include any commitment letters or describe other efforts to secure funding for this project.

No other funding sources are currently committed or under consideration for this project. The Town is requesting CPA funding for the full estimated project cost of \$530,000. Accordingly, there are no commitment letters or other funding documentation to include with the application. If the actual project cost exceeds the CPA award, the Town will evaluate available options to address any funding shortfall before proceeding.

6. Timeline: What is the schedule for project implementation? Include a timeline for critical elements: procurement, groundbreaking, expenditures, and estimated project completion.

Subject to approval and appropriation of CPA funding, project implementation is anticipated during the **summer of 2027**, when school is not in session. The proposed schedule is:

- * **Spring 2027** Finalize the scope of work, construction documents, cost estimate, and procurement requirements.
- * **Spring 2027** Advertise the project, receive bids or proposals, evaluate submissions, and award the construction contract in accordance with applicable Massachusetts procurement requirements.
- * **June 2027** Complete contracting, permitting, material procurement, and preconstruction coordination.
- * **Late June - July 2027** Begin construction, including removal of the failed poured-in-place and asphalt surfaces, completion of necessary site work and drainage improvements, and preparation of the underlying subgrade.
- * **July - August 2027** Install the new asphalt and poured-in-place safety surfaces. Project expenditures will occur primarily during this period as construction progresses.
- * **By late August 2027** Complete inspections, corrective work, project closeout, and final payments, with the goal of reopening the playground before the beginning of the 2027 - 2028 school year.

The schedule may be adjusted based on funding approval, procurement requirements, material availability, weather, and unforeseen subsurface conditions.

7. Urgency: Is there urgency to the completion of this project? What are the ramifications if the project is delayed and/or not completed?

Yes, there is urgency to complete this project. The existing playground surfaces have deteriorated to the point that the playground is no longer compliant with applicable accessibility requirements under the Americans with Disabilities Act (ADA) and the Massachusetts Architectural Access Board (MAAB). The failed poured-in-place safety surface and deteriorated pavement create uneven conditions, potential tripping hazards, and barriers for students and community members with disabilities.

If the project is delayed or not completed, these safety and accessibility concerns will continue and may worsen. The Town and School Department may need to restrict or discontinue use of portions of the playground, limiting access to outdoor recreation, recess, physical education, and social-development opportunities. Continued deterioration could also increase future construction costs and reveal more extensive subgrade or drainage problems.

Completion during summer 2027 is important to restore safe and equitable access while minimizing disruption to school operations. The project will bring the playground into ADA and MAAB compliance, address the underlying site conditions, and preserve this important recreational resource for students, families, and the broader Sudbury community.

8. Implementation: Who will be responsible for implementing the project? Who will manage the project? Does the proposed project manager have relevant experience? Who else will be involved in project implementation and what arrangements have been made with them?

Sandra R. Duran, Combined Facilities Director, will be responsible for implementing and managing the project. She has relevant experience overseeing municipal and school capital improvement projects, including project planning, budgeting, public procurement, contractor coordination, construction administration, schedule management, and project closeout.

The Combined Facilities Department will coordinate with the Sudbury Public Schools and School Committee to minimize disruption to school operations and ensure that the completed playground meets the needs of students and the community. The selected designer or consultant, contractor, playground-surface installer, and other required professionals will be engaged through applicable Massachusetts public procurement procedures.

The project team will coordinate permitting, accessibility compliance, site work, drainage improvements, surface installation, inspections, and final acceptance. Construction is planned for summer 2027 to allow the work to be completed while school is not in session.

9. Maintenance: If maintenance is required, who will be responsible and how will it be funded?

Following project completion, the **Combined Facilities Department** will be responsible for ongoing inspection and routine maintenance of the playground surface, adjacent pavement, and associated site improvements. Routine maintenance will be funded through the Department's annual operating funds. CPA funds will be used only for the proposed capital rehabilitation project and will not be used for routine or general maintenance.

ADDITIONAL INFORMATION: Provide the following additional information, if applicable.

- 10. Further Documentation:** Provide feasibility reports, renderings, map location, and other relevant studies and materials. Photos, detailed design renderings, relevant or comparable projects and supporting documents such as historic structural and existing conditions reports, also will be helpful in defining the parameters of your project.
- 11. Other Information:** Include any additional information that might benefit the Community Preservation Committee in the evaluation of this project.
- 12. Applicants with multiple requests:** Please prioritize your proposals.

Grant recipients are required to acknowledge the Community Preservation Act in press releases, publicity materials, news, and written or oral announcements about work supported with CPA funds. Additionally, the CPC requires signage in the form of a sign or plaque affixed on or adjacent to CPA-funded work as approved by the CPC when possible. The CPC will fund and supply the signage in consultation with the Applicant.

Conflict of Interest: The CPC is governed by Massachusetts General Law Chapter 268A Conflict of Interest Law, which regulates the standards of conduct of all state, county and municipal employees and volunteers, whether paid or unpaid, full or part-time, intermittent or temporary.

Chart 1
COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES (G.L. c. 44B, § 5)

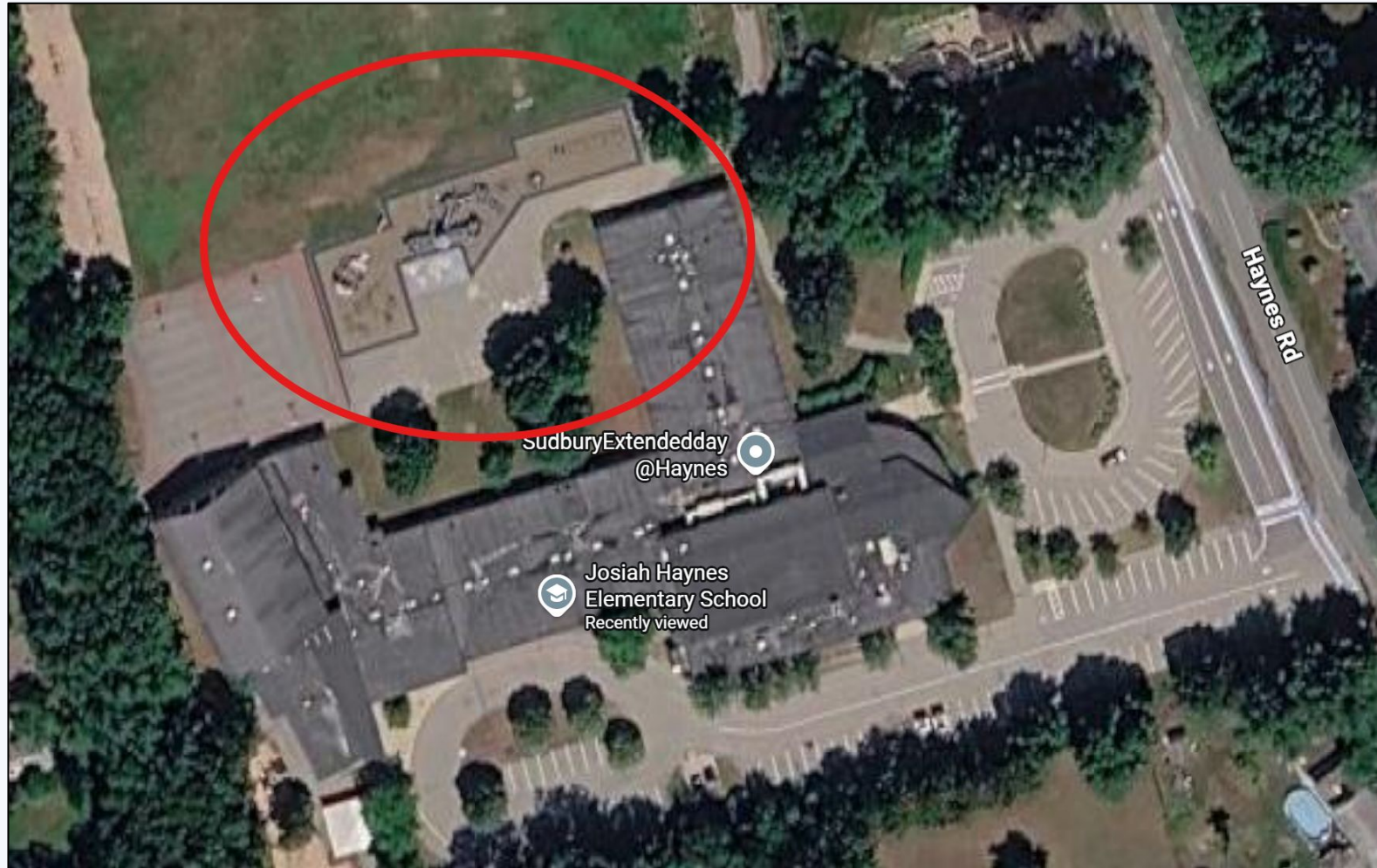
	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
DEFINITIONS (G.L. c. 44B, § 2)	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of the city or town	Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field Does <u>not</u> include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	Housing for low and moderate income individuals and families, including low or moderate income seniors Moderate income is less than 100%, and low income is less than 80%, of US HUD Area Wide Median Income
ACQUISITION Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	Yes	Yes	Yes	Yes
CREATION To bring into being or cause to exist. <i>Seideman v. City of Newton</i> , 452 Mass. 472 (2008)	Yes	X	Yes	Yes
PRESERVATION Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
SUPPORT Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable	X	X	X	Yes, includes funding for community's affordable housing trust
REHABILITATION AND RESTORATION Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties	Yes if acquired or created with CP funds	Yes	Yes	Yes if acquired or created with CP funds

Sudbury Public Schools
FY28 Capital Preservation Funds
Josiah Haynes Playground Resurfacing
Presentation by
Sandra R. Duran, Combined Facility Director
September 14, 2026



FY 27 CPC Project - Josiah Haynes Playground

\$530,000.00



Built in 2018 with a Free Cash CPC Article



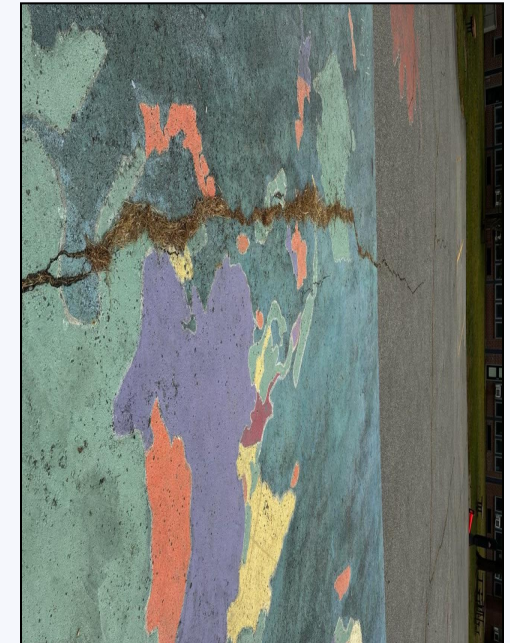
Failed and Deteriorated Poured in Place Surface

- ❑ Surface granules are not adhered
- ❑ Numerous holes and patches
- ❑ Undulating surface (potential subsurface integrity issue)
- ❑ No longer ADA/MAAB Compliant



Deteriorated Pavement

- ❑ No longer ADA/MAAB Compliant
 - ❑ Grass, roots, and accompanying soil moving through cracked pavement create an unstable, slippery surface—especially when wet.
 - ❑ Thick clumps of grass or weeds growing through pavement gaps often push past MAAB changes in Level limits or disguise underlying pavement heaving, presenting a clear tripping hazard.
 - ❑ Openings in the path of travel cannot allow a ½ -inch diameter sphere to pass through, as wide gaps trap wheelchair casters, canes or crutches.



Order of Magnitude Cost Estimate

Haynes Playground & Adjacent Pavement Area Resurfacing	
Poured in Place	\$230,539.00
Site Work/Drainage	\$50,000.00
Pavement overlay (1,436 SY * \$75 per SY)	\$107,700.00
Shade Structure	\$50,000.00
Subtotal	\$438,239.00
Construction Contingency (15%)	\$65,735.85
Subtotal	\$503,974.85
Escallation at 6%	\$26,294.34
Total Estimated Cost	\$530,269.19
Note: A 15% construction contingency is being used as the degraded existing poured in place system once demolished may revel hidden subgrade damage or poor drainage issues that will need to be addressed.	

Questions?

1. Goals: What are the specific objectives of the proposed project? Who will benefit and how?

The goal of the proposed project is to rehabilitate the deteriorated playground surfacing and adjacent pavement at the Josiah Haynes Elementary School and install a new shade structure to create a safe, accessible, durable, climate-resilient, and inclusive outdoor recreation area that complies with current safety and accessibility standards.

Specific objectives include fully removing and replacing the failed poured-in-place safety surfacing, providing an overlay of the deteriorated adjacent asphalt pavement, investigating underlying subsurface conditions and improving drainage where necessary, eliminating uneven surfaces and tripping hazards, improving accessibility, and restoring safe and reliable access to the playground equipment and surrounding play areas.

The project will also include the installation of a shade structure over a portion of the playground. As Massachusetts experiences rising average temperatures and more frequent periods of extreme heat, providing shade at outdoor recreational facilities is increasingly important. The shade structure will provide students with relief from direct sunlight and high surface temperatures, creating a more comfortable outdoor environment and increasing opportunities for safe playground use during warmer weather. In addition to benefiting playground users, reducing prolonged direct sunlight and ultraviolet exposure to the new poured-in-place surfacing is expected to reduce heat and weather-related deterioration and help extend the useful life of the Town's investment in the new safety surface.

The project will primarily benefit Haynes Elementary School students, including children with disabilities and mobility limitations, by providing a safer, more accessible, comfortable, and inclusive environment for physical activity, social interaction, and outdoor learning. It will also benefit school staff, families, youth organizations, and members of the broader Sudbury community who use the playground outside of school hours.

By fully replacing the failed poured-in-place surfacing, overlaying the adjacent pavement, addressing underlying drainage conditions where necessary, and incorporating a shade structure in response to increasingly warmer conditions, the project will preserve and enhance an important community recreational asset, expand opportunities for inclusive play, improve climate resiliency, protect the Town's capital investment, and reduce the need for repeated short-term repairs.

2. Community Need: Why is this project needed? Does it address needs identified in existing Town or regional plan, by committees/board, or needs raised in community discussions? Will the project serve multiple needs or populations?

The Josiah Haynes Elementary School playground is an important recreational resource serving students, families, and the broader Sudbury community. The existing asphalt and poured-in-place safety surfaces have failed and require complete replacement. Their deteriorated condition creates uneven surfaces, potential tripping hazards, accessibility

concerns, and limitations on the safe use of the playground. Continued temporary repairs would not address the underlying deterioration or provide a reliable long-term solution. The project responds to the Town's ongoing need to maintain safe, accessible, and inclusive public recreational facilities and to protect its investment in existing community assets. It supports established municipal priorities related to public safety, accessibility, preventive capital maintenance, and the preservation of outdoor recreation opportunities. The project also responds to concerns raised by school personnel, families, and community members regarding the condition and continued usability of the playground. The improvements will serve multiple needs and populations. During the school day, the playground supports physical education, outdoor learning, recess, social development, and the physical and emotional well-being of Haynes Elementary School students. Outside school hours, it is available to families, neighborhood residents, youth organizations, and other members of the Sudbury community. Replacement of the poured-in-place surface will be particularly important for children and visitors with disabilities by improving access to playground equipment and creating a safer, more inclusive environment. By replacing both failed surfaces as one coordinated project, the Town will restore the playground's safety and usability, improve accessibility, reduce the need for repeated short-term repairs, and preserve a valuable community recreation resource for Sudbury's current and future residents.

3. Community Support: Which Town Boards/Committees/Departments or community organizations have you consulted/collaborated.

The Combined Facilities Department has consulted and collaborated with the Sudbury School Committee regarding the condition of the Josiah Haynes Elementary School playground and the need to replace the failed asphalt and poured-in-place safety surfaces. The Combined Facilities Department is responsible for evaluating the existing conditions, developing the proposed scope of work, coordinating cost and project information, and preparing the Community Preservation Act funding application. The School Committee supports efforts to restore the playground as a safe, accessible, inclusive, and durable recreational resource for students, families, and the broader Sudbury community.

4. Budget: What is the total budget for the project and how will CPA funds be spent? Provide written estimates to substantiate proposed costs. Include a multi-year budget, if appropriate.

The total estimated project budget is **\$530,269.19**, and the School is requesting CPA funding for the full project cost. CPA funds will be used for the comprehensive capital rehabilitation of the Josiah Haynes Elementary School playground and adjacent pavement area, including the complete replacement of the failed poured-in-place safety surfacing, site work and drainage improvements, an asphalt overlay of the adjacent pavement, and installation of a new shade structure. CPA funds will be used exclusively for eligible capital improvements and **will not be used for routine or general maintenance.**

The estimated project costs are:

Project Component	Estimated Cost
Poured-in-place playground surface replacement	\$230,539.00
Site work/drainage improvements	\$50,000.00
Pavement overlay — 1,436 SY at \$75/SY	\$107,700.00
Shade structure	\$50,000.00
Construction Subtotal	\$438,239.00
Construction contingency — 15%	\$65,735.85
Subtotal including contingency	\$503,974.85
Escalation — 6%	\$26,294.34
Total Estimated Project Cost	\$530,269.19

The 15% construction contingency is appropriate because demolition of the severely degraded existing poured-in-place safety surfacing may reveal concealed subgrade deterioration, inadequate drainage, or other subsurface conditions that will need to be addressed before installation of the new surface. The contingency provides sufficient flexibility to correct these presently unknown conditions and help ensure the long-term performance of the new playground surfacing. The 6% escalation allowance accounts for anticipated construction-cost increases between preparation of the estimate and project implementation.

The \$50,000 shade structure allowance will support the installation of a permanent shade structure within the playground area. In addition to providing students and other playground users with relief from direct sunlight and elevated temperatures, the shade structure will reduce direct solar and ultraviolet exposure to portions of the new poured-in-place safety surfacing, helping protect the Town's investment and extend the useful life of the new surface.

The proposed work represents a comprehensive capital improvement rather than routine maintenance. The project will fully replace the failed poured-in-place safety surfacing, rehabilitate the adjacent asphalt pavement through an overlay, investigate and address subsurface and drainage deficiencies as necessary, improve accessibility and safety, provide shade in response to increasingly warmer conditions, and extend the useful life and usability of this important school and community recreational asset.

The project is currently anticipated as a single-phase undertaking; therefore, a multi-year budget is not proposed. The requested CPA funding amount is \$530,000.00.

5. Funding: What other funding sources are committed or under consideration? Include any commitment letters or describe other efforts to secure funding for this project.

No other funding sources are currently committed or under consideration for this project. The Town is requesting CPA funding for the full estimated project cost of \$530,000. Accordingly, there are no commitment letters or other funding documentation to include with the application. If the actual project cost exceeds the CPA award, the Town will evaluate available options to address any funding shortfall before proceeding.

6. Timeline: What is the schedule for project implementation? Include a timeline for critical elements: procurement, groundbreaking, expenditures, and estimated project completion.

Subject to approval and appropriation of CPA funding, project implementation is anticipated during the **summer of 2027**, when school is not in session. The proposed schedule is:

- **Winter–Spring 2027:** Finalize the scope of work, construction documents, cost estimate, and procurement requirements.
- **Spring 2027:** Advertise the project, receive bids or proposals, evaluate submissions, and award the construction contract in accordance with applicable Massachusetts procurement requirements.
- **June 2027:** Complete contracting, permitting, material procurement, and preconstruction coordination.
- **Late June–July 2027:** Begin construction, including removal of the failed poured-in-place and asphalt surfaces, completion of necessary site work and drainage improvements, and preparation of the underlying subgrade.
- **July–August 2027:** Install the new asphalt and poured-in-place safety surfaces. Project expenditures will occur primarily during this period as construction progresses.
- **By late August 2027:** Complete inspections, corrective work, project closeout, and final payments, with the goal of reopening the playground before the beginning of the 2027–2028 school year.

The schedule may be adjusted based on funding approval, procurement requirements, material availability, weather, and unforeseen subsurface conditions.

7. Urgency: Is there urgency to the completion of this project? What are the ramifications if the project is delayed and/or not completed?

Yes, there is urgency to complete this project. The existing playground surfaces have deteriorated to the point that the playground is no longer compliant with applicable accessibility requirements under the Americans with Disabilities Act (ADA) and the Massachusetts Architectural Access Board (MAAB). The failed poured-in-place safety surface and deteriorated pavement create uneven conditions, potential tripping hazards, and barriers for students and community members with disabilities. If the project is delayed or not completed, these safety and accessibility concerns will continue and may worsen. The Town and School Department may need to restrict or discontinue use of portions of the playground, limiting access to outdoor recreation, recess, physical education, and social-development opportunities. Continued deterioration could also increase future construction costs and reveal more extensive subgrade or drainage problems. Completion during summer 2027 is important to restore safe and equitable access while minimizing disruption to school operations. The project will bring the

playground into ADA and MAAB compliance, address the underlying site conditions, and preserve this important recreational resource for students, families, and the broader Sudbury community.

8. Implementation: Who will be responsible for implementing the project? Who will manage the project? Does the proposed project manager have relevant experience? Who else will be involved in project implementation and what arrangements have been made with them?

Sandra R. Duran, Combined Facilities Director, will be responsible for implementing and managing the project. She has relevant experience overseeing municipal and school capital improvement projects, including project planning, budgeting, public procurement, contractor coordination, construction administration, schedule management, and project closeout. The Combined Facilities Department will coordinate with the Sudbury Public Schools and School Committee to minimize disruption to school operations and ensure that the completed playground meets the needs of students and the community. The selected designer or consultant, contractor, playground-surface installer, and other required professionals will be engaged through applicable Massachusetts public procurement procedures. The project team will coordinate permitting, accessibility compliance, site work, drainage improvements, surface installation, inspections, and final acceptance. Construction is planned for summer 2027 to allow the work to be completed while school is not in session.

9. Maintenance: If maintenance is required, who will be responsible and how will it be funded?

Following project completion, the Combined Facilities Department will be responsible for ongoing inspection and routine maintenance of the playground surface, adjacent pavement, and associated site improvements. Routine maintenance will be funded through the Department's annual operating funds. CPA funds will be used only for the proposed capital rehabilitation project and will not be used for routine or general maintenance.



275 Old Lancaster Road Sudbury, MA 01776
978-440-5465; Fax 978-440-5404
Sandra_Duran@sudbury.k12.ma.us

Sandra Duran, Combined Facilities Director

SUDBURY PUBLIC SCHOOLS SCHOOL COMMITTEE MEMORANDUM

TO: Sudbury School Committee

FROM: Sandra R. Duran, Combined Facilities Director

DATE: September 14, 2026

RE: FY28 Community Preservation Act Funding Request — Josiah Haynes Elementary School
Playground Resurfacing

REQUESTED ACTION: Authorize and support submission of an FY28 Community Preservation Act (CPA) funding application in the amount of \$530,000 for the Josiah Haynes Elementary School Playground & Adjacent Pavement Area Resurfacing project, including installation of a new playground shade structure.

Purpose and Project Need

The Combined Facilities Department is seeking School Committee support for an FY28 CPA funding application to rehabilitate the deteriorated playground surfacing and adjacent pavement at the Josiah Haynes Elementary School. The playground, constructed in 2018 with Community Preservation Act and Free Cash funding, is an important school and community recreational asset.

The poured-in-place safety surfacing has substantially failed. Surface granules are no longer properly adhered, numerous holes and patches are present, and the surface is undulating, suggesting a potential subsurface integrity or drainage issue. The adjacent pavement is also deteriorated. Existing conditions no longer comply with applicable accessibility requirements under the Americans with Disabilities Act (ADA) and the Massachusetts Architectural Access Board (MAAB), creating tripping hazards and barriers to safe access for students and community members, particularly those with disabilities.

Proposed Scope of Work

The project will address the poured-in-place safety surfacing and the adjacent asphalt pavement using different rehabilitation methods. Approximately 9,245 square feet of existing poured-in-place safety surfacing will be removed and replaced in its entirety. The adjacent asphalt pavement will not be removed and replaced; approximately 1,436 square yards will instead receive a new asphalt overlay.

Following demolition and removal of the existing poured-in-place surfacing, the exposed subsurface will be investigated to determine whether drainage deficiencies, subgrade deterioration, or other concealed conditions contributed to the failure of the existing surface. If necessary, drainage and related subsurface improvements will be completed before the new poured-in-place safety surfacing is installed. This approach is intended to address both the visible deterioration and any underlying conditions that could affect the longevity and performance of the new surface.

The project will also include installation of a shade structure strategically located to provide shaded play and gathering areas and to reduce direct solar exposure on portions of the new poured-in-place safety surfacing. Massachusetts is experiencing increasing temperatures and more frequent extreme-heat conditions. State climate information indicates that Massachusetts has warmed by nearly 3.5°F since the early 1900s and that the number of days above 90°F is expected to increase substantially in coming decades. Providing shade is therefore an important climate-resilience and playground-comfort measure, particularly for young children using the playground during warmer months.

The shade structure will also help protect the Town's investment in the new poured-in-place surfacing. Poured-in-place rubber is exposed to direct sunlight, ultraviolet radiation, and elevated surface temperatures throughout its service life. Reducing direct solar and UV exposure can lessen heat loading and weathering of the wear surface and is expected to help preserve the surfacing and extend its useful service life. The shade structure will therefore provide both an immediate benefit to playground users and a long-term asset-protection benefit.

The completed work will improve surface stability, transitions, drainage, accessibility, and overall safety while preserving an important recreational resource used by Haynes students during the school day and by families and the broader Sudbury community outside of school hours.

Budget and Funding Request

The estimated project cost is \$530,269.19. The budget includes the complete replacement of the poured-in-place safety surfacing, site work and potential drainage improvements, a shade structure and an overlay of the adjacent pavement. No other funding sources are currently committed or under consideration. CPA funds would be used for the proposed capital rehabilitation and associated improvements and not for routine or general maintenance.

Project Component	Estimated Cost
Poured-in-Place	\$230,539.00
Site Work/Drainage	\$50,000.00
Pavement Overlay (1,436 SY x \$75 per SY)	\$107,700.00
Shade Structure	\$50,000.00
Construction Subtotal	\$438,239.00
Construction Contingency (15%)	\$65,735.85
Subtotal Including Contingency	\$503,974.85
Escalation at 6%	\$26,294.34
Total Estimated Cost	\$530,269.19

The poured-in-place surfacing allowance is supported by the Surface America estimate referenced in the project materials. The 15% construction contingency recognizes that demolition of the degraded poured-in-place system may reveal concealed subgrade deterioration, poor drainage, or other conditions requiring correction. The 6% escalation allowance accounts for anticipated construction-cost increases before implementation.

Implementation Schedule

Subject to CPA approval and appropriation, construction is anticipated during summer 2027, when school is not in session. Spring 2027 activities would include finalizing the scope, shade-structure design and siting, construction documents, cost estimate, and procurement requirements; advertising and awarding the work in accordance with applicable Massachusetts procurement requirements; and completing preconstruction coordination. Demolition, subsurface investigation, necessary site and drainage work, pavement overlay, installation of the new poured-in-place safety surfacing, and installation of the shade structure would occur during the summer, with completion and reopening targeted before the beginning of the 2027–2028 school year.

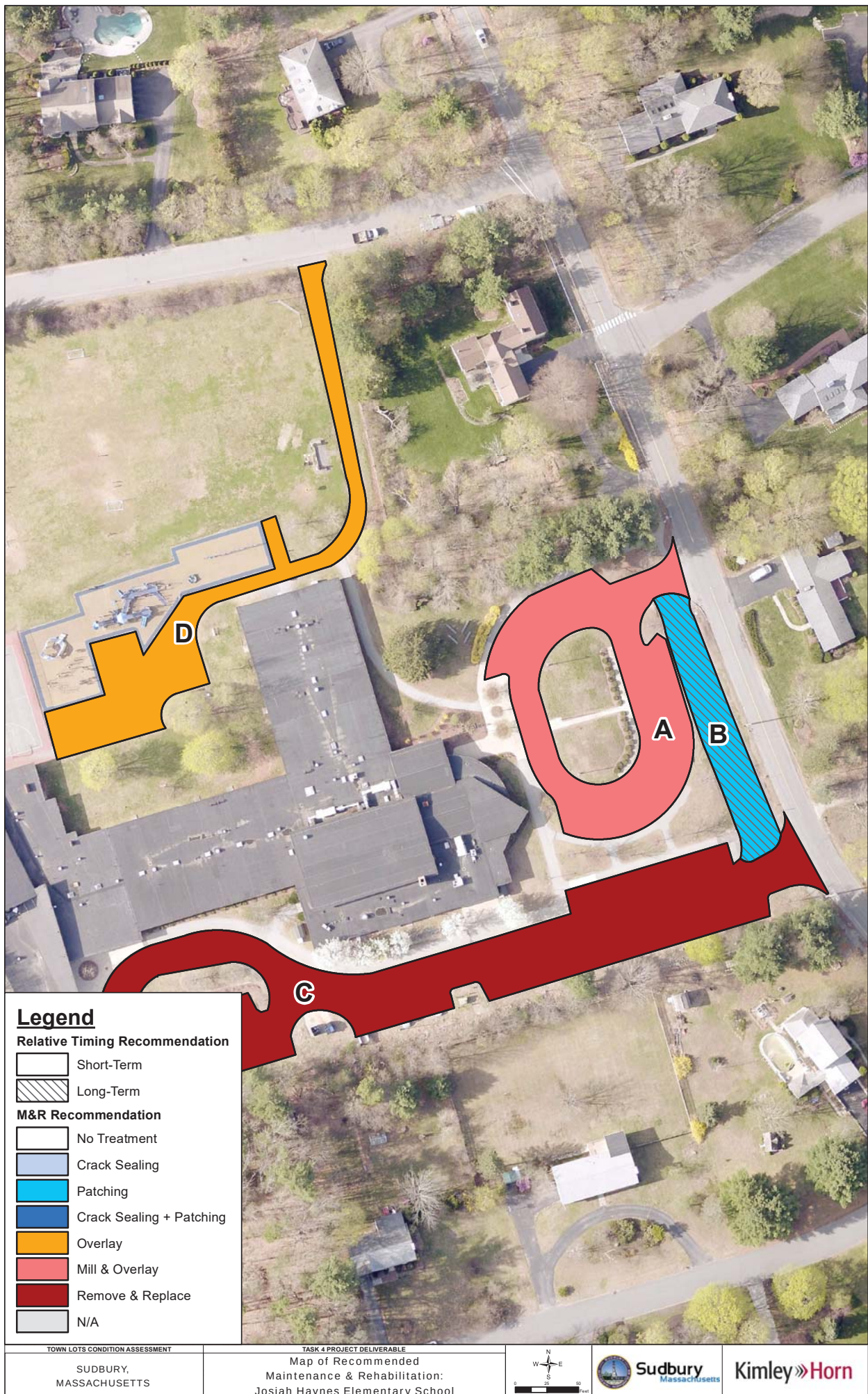
Project Management and Maintenance

Sandra R. Duran, Combined Facilities Director, will be responsible for implementing and managing the project. Responsibilities will include procurement, budget and schedule oversight, contractor coordination, construction administration, accessibility compliance, inspections, and project closeout. The Combined Facilities Department will coordinate with Sudbury Public Schools and the School Committee to minimize disruption to school operations.

Following completion, the Combined Facilities Department will be responsible for ongoing inspection and routine maintenance of the playground surfacing, adjacent pavement, shade structure, and associated site improvements. Routine maintenance will be funded through the Department's annual operating funds; CPA funds will not be used for routine or general maintenance.

Recommendation

The Combined Facilities Department recommends that the School Committee authorize and support submission of the FY28 CPA application for the Josiah Haynes Elementary School playground project, including the new shade structure. The proposed project will address current safety and accessibility deficiencies, fully replace the failed poured-in-place safety surfacing, rehabilitate the adjacent pavement through an overlay, investigate and correct subsurface drainage conditions where necessary, and add shade as a climate-resilience and asset-protection measure. The shade structure will improve comfort and usability during increasingly hot weather while reducing direct solar and UV exposure on portions of the new poured-in-place surfacing, helping protect the Town's investment and support a longer service life.





Surface America, Inc.
PO Box 157
Williamsville NY 14231

SURFACEAMERICA®

Recreational & Athletic Surfacing for Maximum
Performance

Phone: (800) 999-0555

Fax: (716) 632-8324

Quote Number: 106125

QUOTE

Page: 1 of 2

Quote To:

General Contractor

Date: 9/2/2026

Expires: 12/31/2026

Project: Hayes Elementary - Sudbury, MA

Attn:

Description:

PlayBound Poured-In-Place:

Thickness: Combination (thicknesses subject to nominal variation)

1.75 inch (3075 sq ft)

3.5 inch (6170 sq ft)

Color: 50% Color, 50% Black speckled mix (For 100% color instead add \$3.00 per sq ft)

Binder type: Aromatic (For aliphatic binder instead add \$1.50 per sq ft)

Graphics: None

Slopes/mounds: None

Includes freight.

Removal & disposal of existing 9245 sq ft system (at same thicknesses listed above) priced as separate line item.

United States Dollar

Line	Part	Description	Rev	Drawing
1	SYS-001	System, PlayBound Poured-In-Place	001	

Sales Category	Quantity	Unit Price	Net Price
Installed	9,245.00SF	16.20 /1	\$ 149,769.00
Line(1) - Miscellaneous Charge -			
	Removal/disposal existing PIP		\$ 80,770.00

Line 1 Subtotal: \$230,539.00

SA's capabilities are as great or in most cases greater than any other company in the industry. Surface America's PlayBound Poured-In-Place system is IPEMA Certified. REDUCE YOUR RISK BY USING AN IPEMA CERTIFIED MANUFACTURER.

Top surface applied at industry leading rate of 2.44 lbs per sq ft... Long term durability

Thicknesses quoted to meet industry standards for ASTM testing of 1000 HIC, 200 GMax. We are able to meet lower HIC and Gmax values as required but must be provided the written specifications stating that requirement to quote accordingly. If different than what is quoted, customer to advise and pricing will be revised. Surface America's quotes are based on thickness/critical fall height performances as tested by an accredited laboratory, and not subject to results generated by handheld, suspect field testing equipment. Critical fall height impact attenuation warranted for 3 years.

1.75 inch thick Poured-in-Place system meets 4 foot critical fall height.

3.5 inch thick Poured-in-Place system meets 8 foot critical fall height.

SA will work diligently to install every surface with no seams, but uncontrollable situations do arise that prevent a surface from being seamless. In any instance where a seam(s) is installed, it will be as invisible as possible, as tight and strong as possible, and also covered



Surface America, Inc.
PO Box 157
Williamsville NY 14231

SURFACEAMERICA®

Recreational & Athletic Surfacing for Maximum Performance

Phone: (800) 999-0555

Fax: (716) 632-8324

Quote Number: 106125

QUOTE

Page: 2 of 2

under our extensive warranty.

All site work including sub base and edging to be done by others; price is for rubber and surfacing installation only. Play surface to be installed on sub base options in order of recommendation are Concrete, Asphalt or Compacted Aggregate (95% compaction) and are not provided by Surface America. Compacted aggregate is not an acceptable subbase for Evertop alone with no SBR base layer.

Surfacing will be installed to follow slope of the sub base and thickness of safety surfacing quoted to be kept consistent; surfacing will not be installed thicker over drains unless requested and then price will be revised. Please advise if installation is to be installed in any other manner, so quote can be adjusted. If surface detail is confusing as to whether or not flat curb to curb surfacing is needed a detailed grading plan MUST be provided so necessary surfacing thickness can be determined and quote will then be repriced.

For mounds (if quoted) - Max degree of mound is to be 30 degrees or less; 30 deg. (57.5%) max slope for any mound 4' high or over - 45 deg. (100%) max slope for any mound under 4' high. If mound is steeper, Surface America will not be able to warranty surface; also, installation may not even be possible. Compacted aggregate is not an acceptable sub-base for any sloped or mounded area. In these areas the stone would be to be skim coated with concrete or asphalt to make it more stable. If slope is greater than what is recommended, or sub-base of slope or mound is not concrete or asphalt, Surface America cannot guarantee warranty.

If Aliphatic binder is not used, colors may amber when exposed to UV rays. This is an industry wide scenario when Aromatic binder is used. Some colors may amber more than others, however the potential exists for all colors. For all Blues, Pearl, Gray, Purple, Teal, we recommend aliphatic (non-yellowing) binder be considered. Blues and Light Gray will amber (yellow) the most when using standard aromatic. Standard aromatic works best with any of the greens, brown, beige or terracotta.

Top surface is 0.5 inch thick unless otherwise stated. Top surface composed of 1-3.5mm granules & urethane binder. Surface America does not offer any other size rubber granules.

Crews must have free, clear and ease of access to site from unload point for price to hold. Crews would need a minimum of a 6 foot wide clearance opening from the outside to the play area where product is being installed for the equipment and materials used for this installation. Additional costs may be incurred should access be less than acceptable. If stairs are required to gain access to site, pricing will need to be re-quoted and customer must advise location and number of stairs. If material and machinery needs to be hoisted to and from the site, hoisting will be provided at no cost to Surface America. Crane, electrical and water provided by customer at no cost to Surface America. Crane must remain at the site from job start, to job completion. Ease of access into area is necessary for amount estimated. If access is difficult, please advise and request re-quote.

Installation of surfacing system shall occur only when minimum ambient temperatures are 40 degrees F or above throughout the day and overnight.

Purchaser shall be responsible for security, as needed, to prevent vandalism and/or damage of any type to the surface during the installation process, curing time, and after the installation is completed.

All Poured-in-Place systems installed with standard aromatic binder carry a 7 year warranty.

All Poured-in-Place systems installed with aliphatic binder carry a 10 year warranty.

Color Samples: Mix Your Own Color Blends. There are many colors and color combinations. Go to <https://www.surfaceamerica.com/epdm-color-blend-mixer/>

Includes prevailing wage.

Non-union wage. Both Surface America and Surface America installation crews (sub contractors) are non-union. Surface America cannot conform to any PLA/CWA agreements. If a PLA/CWA agreement is required for work to be provided by Surface America, estimate cannot be honored at time of order.

If in-person background checks are required for the installers, and this is not communicated in the quote request, \$1,500 to be added to total.

To place an order, email: orders@surfaceamerica.com

Last updated by: DDDzierba

Contact Surface America with requests, orders, or questions.

**For Material Only Quotes, the necessary sales tax must be added*

**Protection of the surface from damage and vandalism during the installation process is the responsibility of the customer*



Sudbury Public Schools

40 Fairbank Road
Sudbury, Massachusetts 01776
Phone: (978) 639-3211

Annette Doyle

Interim Superintendent of Schools

annette_doyle@sudbury.k12.ma.us

Carol Cavanaugh

Interim Assistant Superintendent

carol_cavanaugh@sudbury.k12.ma.us

To: School Committee

From: Carol Cavanaugh, Interim Assistant Superintendent

Date: September 9, 2026

Re: Metrowest Health Foundation Grant

Betsy Grams, Wellness Curriculum Specialist for the Sudbury Public Schools, has written a grant for the Metrowest Health Foundation and has been awarded \$10,000 for the purposes of:

- Continuing and Expanding Professional Learning Focused on Belonging and School Connectedness
- Strengthening Schoolwide Implementation of SEL and Inclusive Instructional Practices
- Increasing Student Voice and Opportunities for Connection
- Strengthening Family and Community Engagement
- Using Student Voice and Local Data to Guide Mental Health and School Climate Action
- Developing a Student-Facing Mental Health Awareness and Help-Seeking Campaign

The proposed budget prioritizes investing in educator capacity and collaborative planning; developing student voice and growing family and community partnerships; building upon existing school climate initiatives; and developing sustainable practices rather than relying on one-time activities.

I am requesting that the School Committee vote to accept the grant award from the Metrowest Health Foundation in the amount of \$10,000 to be expended for the purposes outlined in the grant application.

RE: Project Funding Agreement Budget Revision Request, NUMBER: 1

The District further acknowledges and agrees that all of the information contained in this Total Project Budget Revision Request has been reviewed and approved by the TOWN of Sudbury, and it further certifies and acknowledges that the funds to pay for the costs associated with these proposed revisions are available as indicated by the signatures noted below.

Use Table 1 below for identification of expenditures against the Owner's contingency. The Total Owner's Contingency in the Current Total Project Budget, Exhibit A of the PFA dated 10/22/2025 is \$33,643 (Please attach all supporting documentation, e.g., executed contracts, amendments and/or supporting invoices for reimbursable expenses)

MSBA USE ONLY						
From Classification Code	From Classification Name	To Classification Code	To Classification Name	Budget Revision Amount	Reason for transfer	Amount Remaining in Owner's Contingency
0801-0000	Owner's Contingency	0203-9900	A&E -Other Reimb. Costs	\$5,470.00	Alignment w/ Contract Amendment	

Table 2: Construction Contingency Budget Revision

Use Table 2 below for identification of expenditures against the Construction Contingency. The Total Construction Contingency in the Current Total Project Budget, Exhibit A of the PFA dated 10/22/2025, is \$336,426 (Please attach all supporting documentation, e.g., executed contracts, amendments and/or supporting invoices for reimbursable expenses)

From Classification Code	From Classification Name	To Classification Code	To Classification Name	Budget Revision Amount	Reason for transfer	Amount Remaining in Construction Contingency	MSBA USE ONLY		
							Ineligible/Cost/Scope Items excluded from the Total Facilities Grant		
							New Scope Exclusion	Transfer Scope Exclusion	Note if any

Table 3: Budget Revisions not originally from Owner's or Construction Contingency

Use Table 3 below for identification of expenditures not originally from Owner's or Construction Contingency. The Current Total Project Budget, Exhibit A of the PFA dated 10/22/2025, is \$7,821,563 (Please attach all supporting documentation, e.g., executed contracts, amendments and/or supporting invoices for reimbursable expenses)

From Classification Code	From Classification Name	To Classification Code	To Classification Name	Budget Revision Amount	Reason for transfer	Amount Remaining in Revised Budget Line	MSBA USE ONLY		
							Ineligible/Cost/Scope Items excluded from the Total Facilities Grant		
							New Scope Exclusion	Transfer Scope Exclusion	Note if any
0201-0500	A&E - Contract Documents	0201-0600	A&E - Bidding	\$12,900.00	Alignment w/ Contract Amendment	\$387,100.00			
0201-0500	A&E - Contract Documents	0201-0700	A&E - CA	\$138,300.00	Alignment w/ Contract Amendment	\$248,800.00			
0201-0500	A&E - Contract Documents	0201-0800	A&E - Closeout	\$10,100.00	Alignment w/ Contract Amendment	\$238,700.00			
0201-0500	A&E - Contract Documents	0203-9900	A&E - Other Reimb. Costs	\$7,700.00	Alignment w/ Contract Amendment	\$231,000.00			
0204-0200	A&E - Haz Mat	0203-9900	A&E - Other Reimb. Costs	\$40,430.00	Alignment w/ Contract Amendment	\$9,570.00			
0500-0000	Construction Contract	0699-0000	A&E - Other Reimb. Costs	Other Project Costs	ADA compliance work performed by District	\$9,130.00			

Notes (applicable where marked in corresponding rows of tables above)

- 1.) This budget transfer has already been incorporated into the ProPay budget as accepted in PFA Bid Amendment. All items noted as N/A in exclusion columns no budget revision request to be entered into ProPay.
- 2.) The exclusions noted in this BRR are not new exclusions, but rather maintain the overall amount of excluded costs in the Total Project Budget without increase. An exclusion amount equal to the amount of the buyout savings entered in GMP contingency will be reduced in the divisions of the construction budget, offsetting the buyout savings amount, in order that the total excluded amount does not increase as a result of the transfer of buyout savings.
- 3.) The exclusions noted in this BRR are not new exclusions, but rather maintain the overall amount of excluded costs in the Total Project Budget without increase. An exclusion amount equal to the amount of the exclusions shown in this BRR will be reduced from the Construction Contingency line item, offsetting the amount being added to the Construction Change Order line item shown in this BRR, in order that the total excluded amount does not increase as a result of the budget transfers included in this BRR. Therefore the 1% or 2% potentially eligible Construction Contingency amount, whichever is applicable to this project, will not be reduced by this BRR.

By signing this Total Project Budget Revision Request, I hereby certify that I have read and understand the terms of this Request and further certify that the information supplied by the District in the tables is true, accurate and complete.


By (Please Print): Andrew J. Sotsek

Title: Chief Executive Officer

Date: 9/8/20

By signing this Total Project Budget Revision Request, I hereby certify that I have read and understand the terms of this Request and further certify that the information supplied by the District in the tables is true, accurate and complete.


By (Please Print): Annette E. Doyle

Title: Superintendent of Schools

Date:

By signing this Total Project Budget Revision Request, I hereby certify that I have read and understand the terms of this Request and further certify that the information supplied by the District in the tables is true, accurate and complete.

By (Please Print):

Title: Chair of the School Committee

Date:

MASSACHUSETTS SCHOOL BUILDING AUTHORITY

Date:

By (Please Print):

Title: Director of

RE: Project Funding Agreement Budget Revision Request, NUMBER: I

The District further acknowledges and agrees that all of the information contained in this Total Project Budget Revision Request has been reviewed and approved by the TOWN of SUDBURY's Public Schools, and it further certifies and acknowledges that the funds to pay for the costs associated with these proposed revisions are available as indicated by the signatures noted below.

Table 1: Owner's Contingency Budget Revision

Use Table 1 below for identification of expenditures against the Owner's contingency. The Total Owner's Contingency in the Current Total Project Budget, Exhibit A of the PFA dated 10-22-2025 is \$16,846. (Please attach all supporting documentation, e.g., executed contracts, amendments and/or supporting invoices for reimbursable expenses)

[illegible]

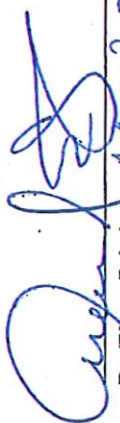
Notes (applicable where marked in corresponding rows of tables above)

1.) This budget transfer has already been incorporated into the ProPay budget as accepted in PFA Bid Amendment. All items noted as N/A in exclusion columns; no budget revision request to be entered into ProPay.

2.) The exclusions noted in this BRR are not new exclusions, but rather maintain the overall amount of excluded costs in the Total Project Budget without increase. An exclusion amount equal to the amount of the buyout savings entered in GMP contingency will be reduced in the divisions of the construction budget, offsetting the buyout savings amount, in order that the total excluded amount does not increase as a result of the transfer of buyout savings.

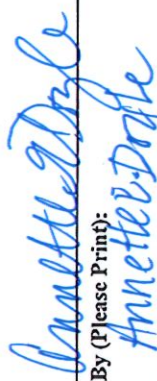
3.) The exclusions noted in this BRR are not new exclusions, but rather maintain the overall amount of excluded costs in the Total Project Budget without increase. An exclusion amount equal to the amount of the exclusions shown in this BRR will be reduced from the Construction Contingency line item, offsetting the amount being added to the Construction Change Order line item shown in this BRR, in order that the total excluded amount does not increase as a result of the budget transfers included in this BRR. Therefore the 1% or 2% potentially eligible Construction Contingency amount, whichever is applicable to this project, will not be reduced by this BRR.

By signing this Total Project Budget Revision Request, I hereby certify that I have read and understand the terms of this Request and further certify that the information supplied by the District in the tables is true, accurate and complete.


By (Please Print): ANDREW J. SHEEHAN

Title: Chief Executive Officer

Date: 9/8/26


By (Please Print): Annette Doyle

Title: Superintendent of Schools

Date:

By (Please Print):

Title: Chair of the School Committee

Date:

MASSACHUSETTS SCHOOL BUILDING AUTHORITY

Date: _____

By (Please Print): _____ Title: Director of _____

**Sudbury Public Schools
School Committee Meeting**

Date: September 14, 2026

Agenda Item: 4a - Combined Facility Director
i. Haynes and Nixon Roof Projects Update

Recommendation:

Background / Preparation Information:

Sandra will update us on the roof projects at Haynes and Nixon which will include an update on the mold spores at Nixon. I do not anticipate a vote on this agenda item tonight. Please review the documents and bring any questions.

Attachments:

MEMORANDUM to SC Capital Projects Update 9.14.2026
School Committee Capital update 9.14.2026

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



275 Old Lancaster Road Sudbury, MA 01776
978-440-5465; Fax 978-440-5404
Sandra_Duran@sudbury.k12.ma.us

Sandra Duran, Combined Facilities Director

SUDBURY PUBLIC SCHOOLS SCHOOL COMMITTEE MEMORANDUM

TO: Sudbury School Committee

FROM: Sandra R. Duran, Combined Facility Director

DATE: September 14, 2026

RE: Combined Facility Department Capital Project Update

PURPOSE: Provide the School Committee with a status update on active Sudbury Public Schools capital, facility, safety, and planning projects.

Josiah Haynes Elementary School - Fire Alarm, Emergency Lighting and BDA

The Haynes fire alarm replacement/BDA project is substantially complete. The new system has been inspected, tested, and approved by the Fire Department. The presentation materials also document the new main electrical panel and inspections by the Fire and Building Departments. Miscellaneous punch-list items remain, including backordered exit signs, and all previously existing devices, panels, and actuators have been removed.

Haynes/Nixon Roof Replacement

Roof replacement work remains in progress at Haynes and Nixon. At Haynes, demolition and reroofing are proceeding, including installation of insulation and TPO membrane, gym roof shingle replacement, and preparation for edge metal. Classroom sinks and hi-low fountains are complete. Remaining roof sections at Haynes are scheduled for replacement in September, followed by manufacturer inspection, skylight installation, and project closeout.

Haynes Remaining Work	Target
Edge metal and flashing installation	Daily
Remaining roof sections not yet stripped/replaced	September 11 and 18, 2026
Manufacturer inspection	Week of October 5, 2026
Skylight installation	Week of October 24, 2026
Completion/closeout	On or before November 24, 2026

At Nixon, crews are installing wrap and flashing at parapet and brick walls, preparing for new edge metal, flashing curbs for future steel-post installation, and completing roofing at the location of a completed steel frame. Solar steel installation has been deferred to summer 2027.

Nixon Remaining Work	Target
Edge metal and flashing installation	Daily
Manufacturer inspection	Week of October 5, 2026
Guardrail installation	October 10, 2026
Skylight and roof ladder installation	Week of November 28, 2026
Phase I completion/closeout	On or before December 11, 2026
Phase II - mobilize for solar steel installation	June 28, 2027
Phase II completion/closeout	On or before July 15, 2027

School Safety Projects

The Noyes vestibule remains in design following field measurements. Other school safety work is also advancing: DPW installed a new accessible pathway at the Noyes student pickup area and placed boulders at Curtis; procurement is underway for bollards and swing gates at Noyes and Curtis; and access-control enhancements began the week of August 17, 2026 and remain in progress.

School HVAC Study

Existing-condition and electrification studies are complete. Cost estimating and development of the capital renewal schedule are in process, with project deliverables targeted for October 30, 2026.

Curtis Solar Canopy

The Curtis Solar Canopy project remains in the study/design phase. The PPA has been signed, the interconnection service agreement is complete, and a SMART award has been received. Ground-penetrating survey and geotechnical field testing have been completed. The project team is awaiting the geotechnical report and preliminary canopy designs. Future permitting is expected to include Zoning Board of Appeals Special Permit and Planning Board Site Plan Review activities, with a summer 2027 installation goal.

Haynes Playground Resurfacing

The Haynes playground resurfacing project remains in progress pending funding. The rear playground requires resurfacing, and the pavement between the school building and playground is failing and is not accessible. The Combined Facilities Department recommends addressing the rear playground poured-in-place surfacing together with an asphalt overlay of the adjacent paved area as part of the CPA-funded project. The side playground is anticipated to be deferred to a future CPA funding round.

Summary

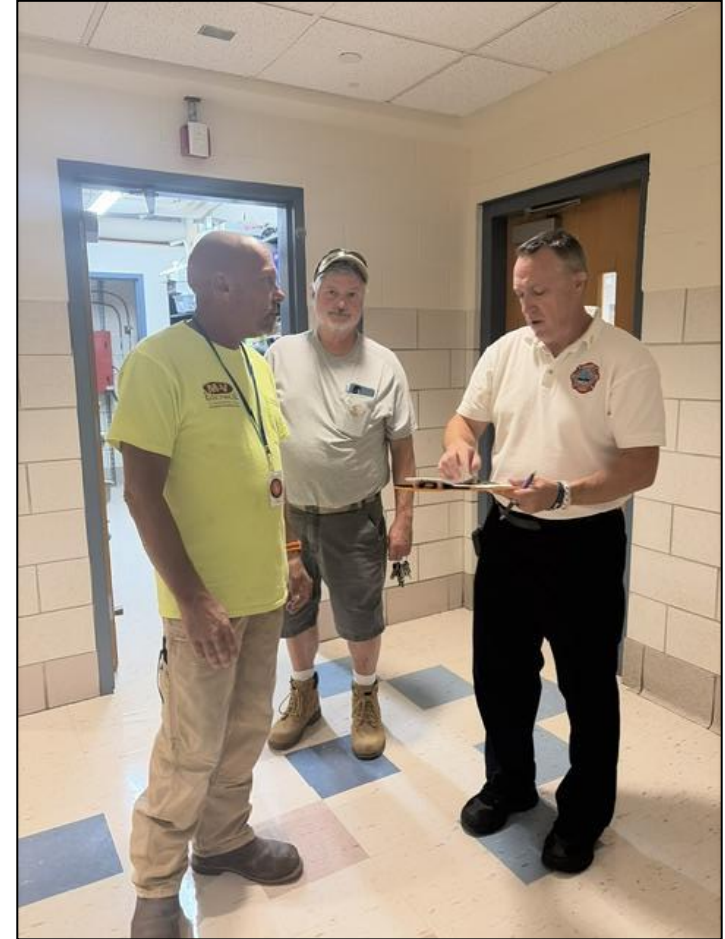
The Combined Facilities Department continues to coordinate active construction, design, procurement, and planning efforts across Sudbury Public Schools. Current priorities include completing the Haynes and Nixon roofing work, advancing school safety improvements, completing the HVAC study and capital renewal planning, progressing Curtis Solar through design and permitting, and pursuing funding for the Haynes playground improvements.



**Combined Facility Department Capital Update
September 14, 2026**

**Sandra Duran
Combined Facility Director**

Haynes Fire Alarm Replacement/BDA Project –Complete, tested and approved



Photos show New Main Electrical Panel and School Inspection by Fire Department and Building Department

Haynes Roof in progress



Photos show installation of insulation and TPO membrane



Haynes Roof in progress



Photos show gym roof shingle replacement and prep work for edge metal installation



Haynes Remaining Work and Completion Target Schedule

- ☐ Edge metal and flashing installation - daily
- ☐ Remaining roof sections not yet stripped/replaced –
9/11/2026 and 9/18/2026
- ☐ Manufacturer inspection – week of 10/5/2026
- ☐ Skylight installation – week of 10/24/2026
- ☐ Completion/closeout – on or before 11/24/2026

Nixon Roof in progress



Photos show installing wrap and flashing at parapet walls and flashing at brick wall



Nixon Roof in progress



Prepping for new edge metal, installing flashing at curbs for future steel post installation and finish roofing at location of one completed steel frame.



Nixon Remaining Work and Completion Target Schedule

- ☐ Edge metal and flashing installation - daily
 - ☐ Manufacturer inspection – week of 10/5/2026
 - ☐ Guardrail installation – 10/10/2026
 - ☐ Skylight and roof ladder installation – week of 11/28/2026
 - ☐ Phase I Completion/closeout – on or before 12/11/2026
-
- ☐ Phase II – Steel installation for Solar panels – mobilize
6/28/2027
 - ☐ Phase II Completion/closeout – on or before July 15,2027

Other Project Updates

☐ **School Safety Project**

- ☐ Noyes vestibule in design
- ☐ DPW has installed new pathway at Noyes student pick up area
- ☐ DPW has installed boulders at Curtis
- ☐ Procurement activities underway for bollard and swing gate installations at Noyes and Curtis
- ☐ Access control enhancements began the week of August 17, 2026 and are in progress.

☐ **School HVAC Study**

- ☐ Existing condition studies complete
- ☐ Electrification studies complete
- ☐ Cost estimating and capital renewal schedule development in process
- ☐ Target schedule for deliverables – October 30, 2026

☐ **Curtis Solar**

- ☐ Geotechnical site work is complete; awaiting report and preliminary solar canopy designs

Questions?

**Sudbury Public Schools
School Committee Meeting**

Date: September 14, 2026

Agenda Item: 4b - Interim Superintendent Entry Plan & Goals / Becky McFall
Introduction

Recommendation:

Motion to approve the Interim Superintendent Goals as presented/amended.

Background / Preparation Information:

Annette will present her entry plan and goals as Interim Superintendent. She will also introduce her mentor, Becky McFall, who will be joining us at the meeting. Please review the information in the packet and bring any questions or feedback you may have.

Attachments:

Entry Plan FY27 Updated

Interim Superintendent Draft Goals FY27

Action: XX

Report:

Discussion: XX



September 14, 2026

Dear Sudbury Public Schools Community,

I am deeply honored to be your Interim Superintendent. Having served as the Assistant Superintendent for Teaching & Learning and the Peter Noyes Elementary School Principal for the last two decades, I am fully committed to Sudbury and deeply proud of the work we have accomplished together.

As we move forward, I pledge to lead with integrity, courage, and joy in service of our students and the entire SPS community. We have a lot of work ahead and we will excel if we work together.

As we begin this next chapter, let's bring our district's **mission** to life:

The Sudbury Public Schools strive to enable all students to reach their intellectual and personal potential. The school system, in partnership with families and the community, will work with integrity and respect to realize the shared vision of enabling students to become lifelong learners and effective contributors of society.

In seeking partnership, I am launching a **Listening and Learning Tour** across Sudbury as part of my **Entry Plan**. While I already know and love this district, this tour is a chance to look at our schools through fresh eyes including those of students, staff, families, and community members. My goal is to listen deeply, understand our strengths and challenges, and identify areas where we can grow.

Over the coming months, I'll be connecting directly with many individuals and groups. You can find more specific details about my Entry Plan in the pages ahead.

Thank you for partnering with me on this journey.

Warmly,

Annette Doyle

Annette Doyle, Interim Superintendent

"If you want to go fast, go alone. If you want to go far, go together."

African Proverb

INTRODUCTION

The “Why”

The purpose of this entry plan is to define the process I will follow to further my knowledge of the Sudbury Public Schools. My primary aim is to cultivate a more comprehensive understanding of our District, gaining deeper insight into our established policies, organizational structures, and daily practices. I am committed to nurturing and expanding upon vital relationships with staff, students, families, and the broader community. This is a unique occasion not only to evaluate our schools through a fresh lens, but also to offer our educators, scholars, and community members the chance to engage with me in this new role as we foster mutual trust and establish transparent channels of communication.

The “How”

Over the next several months, I will facilitate a series of individual interviews, targeted focus groups, and open forums to engage with a variety of SPS community members. In addition to these conversations, I will examine district data and organizational reports, focusing on our system's efficacy in addressing student needs across both academic and social-emotional domains. This will include academic performance metrics, attendance and behavioral trends, wellness data, budget and facility plans, and audit findings from the Department of Elementary and Secondary Education (DESE).

The “What”

Throughout the entry plan process, I will collect data from the five (5) guiding questions below that will anchor each of the conversations and guide this plan:

1. What are the strengths of the Sudbury Public Schools and our community?
2. What are the greatest challenges keeping Sudbury Public School students from performing at their highest levels?
3. What must we protect or sustain in our system?
4. What are our biggest opportunities for growth?
5. As we think about our schools in the next 5-10 years, what should our goals be for the future?



SUDBURY PUBLIC SCHOOLS VALUES AND BELIEFS

District Vision

We are committed to excellence in educating students to be knowledgeable, creative, independent thinkers who are caring, collaborative members of the school and wider communities.

Equity Statement

Sudbury Public Schools are committed to welcoming, affirming, and celebrating all students, staff, and families.
Sudbury Public Schools are committed to creating and sustaining a culture that promotes advocacy, equity, and justice for marginalized groups who have been systemically oppressed and excluded.
Sudbury Public Schools are committed to an anti-bias education that includes and values the perspectives and histories of diverse peoples.

Inclusion Statement

All means All.
Sudbury Public Schools is committed to being an inclusive environment where all students are full members of our school community. We hold to the belief that all individuals should be respected, valued, and included by peers, teachers, parents/guardians, and the community at large. We are an inclusive environment where all students feel safe and thrive socially, emotionally, physically and academically.

Theory of Action

If the Sudbury Public Schools provides:
Differentiated high quality instruction
Safe school environment
Instructional leadership and ongoing professional development
The use of data to inform instruction

Then:
Students will be challenged and their varied learning needs met
Capacity of educators will grow
Existing achievement gaps will narrow

Sudbury Public Schools Core Values

- Enhance the learning and teaching processes to enable and inspire students to achieve their potential.
- Actively promote personal responsibility and integrity.
- Seek and promote opportunities to advance equity.
- Cultivate a lifelong commitment to community.

Students at the Heart: My Core Educational Values



Rooted in the district's strategic vision and my personal core values, this Entry Plan aims to bridge policy with purpose. It is designed around a singular synthesis: our responsibility to nurture the whole child, balancing rigorous academic advancement with meaningful human development.

OVERVIEW AND TIMELINE

The Entry Plan is structured into three phases.

- **Phase I: Listening & Learning** (July 2026 – January 2027): I will engage a broad spectrum of community members – including students, families, staff, and community leaders – through forums, interviews, site visits, and document reviews to get a more complete picture of our district.
- **Phase II: Finding the Trends** (January – March 2027): Next, I'll dive into what was learned, pinpointing our biggest strengths and the areas that need our attention. I'll share these insights directly with the School Committee and the wider community.
- **Phase III: Strategy Development** (April – August 2027): Finally, I'll partner with district leadership to use these findings to sharpen and execute our Strategy for District Improvement, keeping our focus exactly where it belongs: improving the educational experience for every student.

PHASE I: LISTENING AND LEARNING

July 2026 - January 2027

In Phase 1, I will be gathering as much information as possible. Over the next few months, I'll be learning about our schools through a mix of:

One-on-one and group conversations
Reviewing district documents and data
Visiting schools and spending time in classrooms

Here are the key groups I'll be listening to during this first phase:

Students / Parents / Community	District Faculty / Staff	District Leadership
• Students (school groups) • Parents/Guardians (forums) • Town Administrators • Police and Fire Chiefs • Community Groups / PACs • School Councils / PTOs	• Classroom Teachers • Support Staff • School Nurses • Clerical Staff • Custodial Staff • Food Service • Central Office Staff	• District Administrators • School Administrators • School Committee Members • Union Leadership

Currently Scheduled Listening Sessions

Parent / Guardian listening sessions will occur on Open House nights on the following evenings:

September 10:	Loring Elementary School
September 17:	Noyes Elementary School
September 23:	Haynes Elementary School
September 24:	Nixon Elementary School
September 30:	Curtis Middle School
October 1:	Curtis Middle School

Staff listening sessions will occur on the following dates:

September 22:	Curtis Middle School
September 24:	Noyes Elementary School
October 1:	Loring Elementary School
October 22:	Haynes Elementary School
October 26:	Nixon Elementary School

Document and Data Review

The documents I will review include:

- District Strategic Plan
- School Improvement Plans
- Family Handbook
- School Committee Policy Manual
- Enrollment Data
- School and District Report Cards (DESE)
- School Discipline Reports (DESE)
- District School MCAS
- District Assessment Data
- Teacher and Administrative Evaluation Documents
- Special Education Program Evaluations
- Collective Bargaining Agreements
- Curriculum and Assessment Documents
- Emergency and Safety Plans
- Budget and Grants Documents
- Capital Improvement Projects and Facilities Data
- Coordinated Program Review Documents from DESE
- METCO student participation and inclusion

As I review our documents and data, I'll be looking for overall trends and patterns. What I learn will form the foundation of the report I'll present to the School Committee. More importantly, it will help guide us as we implement and update the District's Strategic Plan.

Instructional and Operational Observations

To more deeply understand the lived experience of students and staff, I will regularly visit each school to observe classroom interactions, operational routines, and overall school culture.

- **In the Classroom:** I look forward to observing the dynamics between staff and students, see how our curriculum is implemented, and witness how our educators engage and challenge their students.
- **In Operations:** I will examine the daily routines that quietly support our learning environments to ensure our schools run safely and efficiently.
- **Context & Collaboration:** School visits will allow me to ground stakeholder feedback in real-world context.

Ultimately, these insights will serve as the foundation for meaningful, ongoing dialogue about our instructional practices and school operations, ensuring our future strategies are rooted in the true reality of our district.

PHASE II: FINDING THE TRENDS

January - March 2027

This winter, the data collection process and initial conversations will be complete, and the focus will shift to analyzing and reporting the findings. I'll work to identify patterns and trends across the district. This analysis will reveal what is working well and highlight areas needing further attention to ensure we provide the best learning experiences for every student. The findings will be compiled into a comprehensive Report of Entry Findings, which will be presented to the Sudbury School Committee and shared with the broader community, guiding the next steps in developing the District's Strategic Plan.

PHASE III: STRATEGY DEVELOPMENT

April – August 2027

Based on the results from the Report of Entry Findings, we will begin a comprehensive planning process. The primary objective of this phase is to leverage the insights gained to enhance the teaching, learning, and overall schooling experience for every student. The district's leadership team and I will collaborate to review and refine the District's Strategic Plan, ensuring that our commitments and actions are aligned with the current needs and priorities identified during the entry process. This phase will involve setting clear goals, developing targeted strategies, and implementing changes designed to foster an inclusive, supportive, and high-achieving educational environment for all students.

Conclusion

My goal in launching this entry plan is to build a deep, authentic understanding of the Sudbury Public Schools. By engaging with many stakeholders, observing daily school practices, and analyzing critical data, I intend to capture both the qualitative and quantitative realities of our district. This comprehensive approach will allow us to celebrate our strengths, identify areas for growth, and collaboratively refine a shared vision for excellence, equity, and inclusion that enhances the educational experience for every student.



Interim Superintendent Goals 2026-2027



DRAFT



Goal 1: Effective Entry and Direction Setting

By late spring, the district will have broad recognition by key stakeholder groups about the district's most critical needs and will have a widely understood process underway to identify the strategies and goals that will address those needs most effectively, and the measures that will be used to assess progress.

Key Actions

1. By the end of September, present to the School Committee a written **Entry Plan**, including (a) types of evidence to be analyzed, (b) stakeholders to be interviewed, (c) methods for assessing instructional practice, (d) process to be used to identify any access and achievement gaps, (e) methods for assessing district systems of support including financial management, human resources, and operations.
2. By April, complete and present a **Report of Entry Findings** that (a) synthesizes evidence, (b) identifies strengths of the system and the most critical areas of the system that require further inquiry, (c) identifies next steps for study.
3. By May, launch a process to engage key stakeholders in identifying key strategies to improve student learning and other district systems of support.

Benchmarks

1. Presentations completed on schedule
2. Strategy development process launched

Goal 2: Maintaining Momentum During Transition

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

Key Actions

1. By October 30, 2026, review and establish student learning goals, professional practice, and district/school improvement goals with all principals and administrators.
2. By April 1, complete Formative Evaluation conferences with each principal and district administrators the superintendent supervises.
3. By May, complete at least 5 formal school visits to each school.
4. By June 30, analyze progress on goals and complete Summative Evaluation Reports for all supervisees.

Benchmarks

1. Completed Educator Evaluation Plans
2. Log or notes demonstrating at least 5 visits per school
3. Analysis of Summative Evaluation Reports demonstrates "meets" or "exceeds" rating on 75 percent of principal and district administrator goals

Goal 3: New Superintendent Induction Program (NSIP)

Develop skills in strategy development, data analysis, and instructional leadership by actively engaging in the first year of the New Superintendent Induction Program.

Key Actions

1. Attend eight day-long sessions.
2. Complete NSIP assignments.
3. Meet with the assigned coach at least monthly.

Benchmarks

1. The calendar documents attendance and contact with the coach
2. Verification from NSIP that the superintendent actively engaged in the first year of the program

**Sudbury Public Schools
School Committee Meeting**

Date: September 14, 2026

Agenda Item: 4c - Review District Strategic Plan and District Goals

Recommendation:

Background / Preparation Information:

Annette has met with her leadership team and composed a draft of the strategic plan and goals for the district. Please review these items in the packet and bring any questions to the meeting. We will potentially be approving these items in a subsequent meeting.

Attachments:

26-27 SPS Strategic Plan DRAFT

Action:	XX	Report:	Discussion:	XX
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Sudbury Public Schools

District Strategic Plan

2026-2027

Forward

The success of every student in our schools is at the heart of all that we do. This Strategic Plan developed using DESE's Planning for Success (PfS) process serves as a guiding framework to ensure that our district remains focused, intentional, and unified in pursuit of educational excellence and equity for all learners. It outlines our shared vision and core priorities designed to prepare students for success in a rapidly changing world.

The purpose of this Strategic Plan is to align our district's goals, resources, and initiatives with a clear, long-term vision for student achievement and well-being. It provides a roadmap for decision-making, continuous improvement, and accountability across schools and departments. By clearly defining our priorities, the plan enables us to measure progress, celebrate growth, and prepare thoughtfully for challenges and changing needs.

In an educational landscape marked by evolving expectations, diverse student needs, and increasing demands on schools, it is essential to act with clarity and coherence. Using the following criteria, this plan was developed to ensure it reflects shared values and aspirations.

- **Compelling and Aspirational:** The initiative is motivating and future-oriented, reflecting the district's vision and values while inspiring commitment and innovation.
- **Coherence Across Initiatives:** The initiative aligns with and reinforces the other initiatives, avoiding redundancy or contradiction; together they form a unified direction.
- **Supports Rigorous Implementation:** The initiative is designed to promote depth over breadth, reflection on practice, and continuous improvement through intentional implementation action steps.
- **High Leverage:** The initiative is likely to produce a significant, measurable impact on student outcomes and/or system performance, especially when implemented well.
- **Feasible:** The initiative is achievable within the district's current or reasonably projected capacity (resources, time, staffing).

Grounded in research and responsive to local context, the Strategic Plan is not just a document—it is a living commitment to equity, innovation, and excellence. It ensures that all students—regardless of background or circumstance—have access to rigorous, inclusive, and supportive learning environments that foster both academic and personal growth.

Sudbury Public Schools

District Strategic Plan - 2026-2027

Mission

The Sudbury Public Schools strive to enable all students to reach their intellectual and personal potential. The school system, in partnership with families and the community, will work with integrity and respect to realize the shared vision of enabling students to become lifelong learners and effective contributors of society.

Vision

We are committed to excellence in educating students to be knowledgeable, creative, independent thinkers who are caring collaborative members of the school and wider communities.

Core Values

- Enhance the learning and teaching process to enable and inspire students to achieve their potential
- Actively promote personal responsibility and integrity
- Seek and promote opportunities to advance equity
- Cultivate a lifelong commitment to community

Equity Statement

Sudbury Public Schools are committed to welcoming, affirming, and celebrating all students, staff, and families. Sudbury Public Schools are committed to creating and sustaining a culture that promotes advocacy, equity, and justice for marginalized groups who have been systematically oppressed and excluded. Sudbury Public Schools are committed to an anti-bias education that includes and values the perspectives and histories of diverse peoples.

Theory of Action

IF SPS provides:

- Differentiated high quality instruction
- Safe school environment
- Instructional leadership and ongoing professional development
- The use of data to inform instruction

THEN:

- Students will be challenged and their varied learning needs met
- Capacity of educators will grow
- Existing achievement gaps will narrow

Sudbury Public Schools

District Strategic Plan

2026-2027

STRATEGIC OBJECTIVES

The Sudbury Public Schools' promises unwavering commitment to its mantra:
"ALL MEANS ALL."

INCREASE GROWTH AND ACHIEVEMENT FOR EVERY STUDENT: The District will implement evidence-based curricula and instructional strategies that maximize outcomes for all students.

GROW STUDENTS' SOCIAL, EMOTIONAL, BEHAVIORAL, AND PHYSICAL WELLNESS: The District will ensure that social emotional learning is taught and integrated into classroom practices; that expectations for behavior are upheld, and restorative practices employed; that physical wellness is promoted as a lifelong activity.

DEVELOP A SAFE, CHILD-CENTERED LEARNING ENVIRONMENT: The District will strengthen protocols for physically safe and supportive schools, grow educator capacity to foster safe learning environments in which children take risks, and review and address infrastructure and access needs across all five school facilities

STRATEGIC INITIATIVES

1.A Implement High Quality Instructional Materials (HQIM) and practices tied to rigorous standards, to ensure that learning opportunities are consistent, coherent, and equitable and focused on developing student agency.

2.A Enhance educator capacity to promote a positive climate for learning by modeling SEL signature practices during professional development sessions and staff meetings, and providing professional learning on implementing SEL curriculum and best practices.

3.A Enhance educator capacity to promote a positive climate for learning in which there is equity of access and promotion of student agency.

1.B Develop and implement a structured, inclusive, and evidence-based curriculum review process that ensures academic programs align with current standards and meet the evolving needs of our students.

2.B Review and develop structures, supports, and specialized programs to meet the learning and emotional needs of all students.

3.B Strengthen and maintain district wide safety protocols and practices to maximize safety and foster supportive schools.

1.C Develop and expand <u>Multi-tiered Systems of Support</u> (MTSS) that enhance equitable, accessible, inclusive, challenging, and engaging learning experiences for all.	2.C Create and support a reflective culture built on a foundation of evidence to promote continuous improvement.	3.C Use student survey data to inform the ways we strengthen students' sense of belonging.
1.D Develop and expand digital literacy to empower students to thrive academically and navigate the digital world safely and responsibly.	2.D Redesign elements of the Physical Education and Health curricula to promote physical, social, emotional, and behavioral wellness	3.D Examine the <i>Facilities Conditions Assessment Plan</i> to ensure infrastructure needs are met, including providing a safe, healthy, and accessible learning environment in all SPS school buildings.
	2.E Enhance collaboration and accessible communication with the SPS community to foster student success, build partnerships with families, and reduce barriers to inclusion.	

ACTION STEPS

1.A Implement High Quality Instructional Materials (HQIM) and practices tied to rigorous standards, to ensure that learning opportunities are consistent, coherent, and equitable and focused on developing student agency. • 1.A.i Implement Expeditionary Learning (EL) ALL Block grades K-5 • 1.A.ii Initiate multi-year ELA curriculum revisions in grade 6 • 1.A.iii Review and align mathematical course content with HQIM and course progressions and continue to focus on engaging and equitable mathematical experiences for all students	2.A Enhance educator capacity to promote a positive climate for learning by modeling SEL signature practices during professional development sessions and staff meetings, and providing professional learning on implementing SEL curriculum and best practices. • 2.A.i Model SEL signature practices during professional development sessions and staff meetings • 2.A.ii Facilitate professional learning in implementing SEL practices, including demonstrating the connection between the new Teacher Evaluation Rubric and SEL implementation	3.A Enhance educator capacity to promote a positive climate for learning in which there is equity of access and promotion of student agency. • 3.A.i Transition to 2024 Teacher Evaluation Rubric, which integrates culturally and linguistically sustaining practices directly into indicators • 3.A.ii Develop instructional resources and build staff capacity to implement inclusive practices that strengthen belonging for all students, particularly those who report feeling marginalized. • 3.A.iii Revise Aspen coding and related processes for more consistent identification, documentation, and follow-up of bullying, harassment, and discrimination.
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● 1.A.iv Consistently implement all components of Bridges in Mathematics 3rd Edition in all K-5 classrooms ● 1.A.v Review middle school mathematics pathways and analyze resulting data. ● 1.A.vi Implement supplemental course for 8th grade Geometry standards to offer additional pathway into Algebra ● 1.A.vii Continue year 4 of a 5-year implementation of OpenSciEd at the middle school including expanding on embedded Universal Design for Learning (UDL) practices ● 1.A.viii Revise elementary science curriculum by shifting to a phenomenon-based storyline approach and developing assessments and guidance documents to improve alignment in science teaching and learning ● 1.A.ix Continue to develop a shared understanding of MTSS and Universal Design for Learning ● 1.A.x Develop integrated rubric for elementary and middle school classroom walk-throughs	2.A.iii Review Tier 2 social-emotional supports and screeners, considering data-informed practices and response.	
1.B Develop and implement a structured, inclusive, and evidence-based curriculum review process that ensures academic programs align with current standards and meet the evolving needs of our students. ● 1.B.i Develop and implement a structured, inclusive, and evidence-based curriculum review process that ensures academic programs align with current	2.B Review and develop structures, supports, and specialized programs to meet the learning and emotional needs of all students. ● 2.B.i Continue to refine the IEP process by building unified district practices. ● 2.B.ii Strengthen the goal writing and practices across domains to ensure student outcomes by	3.B Strengthen and maintain district wide safety protocols and practices to maximize safety and foster supportive schools. ● 3.B.i Provide training for staff and instructional sessions for students on revised lesson on <i>Say Something</i> Anonymous Reporting System (Year 3 implementation) ● 3.B.ii Communicate the purpose and procedures for reunification to

standards and meet the evolving needs of our students • 1.B.ii Address the findings of the elementary Spanish curriculum review • 1.B.iii Outline a curriculum review timeline for all core content areas	monitoring progress data. • 2.B.iii Provide ongoing professional learning and support for staff responsible for IEP and program development and implementation. • 2.B.iv Analyze short and long-term trends in student needs and service utilization to guide future structure, capacity and development of special education and services.	staff and families. Practice the procedures with administration. Purchase necessary supplies • 3.B.iii Name Safety Warrant Article items
1.C Develop and expand <u>Multi-tiered Systems of Support</u> (MTSS) that enhance equitable, accessible, inclusive, challenging, and engaging learning experiences for all students. • 1.C.i Continue to develop a shared understanding of MTSS and Universal Design for Learning • 1.C.ii Review, revise, and align guideline criteria for Tiered Support Systems • 1.C.iii Review preschool structure to avoid barriers and ensure early childhood community access.	2.C Create and support a reflective culture built on a foundation of evidence to promote continuous improvement. • 2.C.i Provide coaching and collaboration time on using data to analyze and evaluate information through an equity lens to support daily instruction • 2.C.ii Expand data warehousing capacity • 2.C.iii Utilize the updated DCAP (District Curriculum Accommodation Plan) to inform the Student Support Teams (IST/BBST) processes	3.C Use student survey data as well as professional development to inform work on students' sense of belonging. • 3.C.i Use Metrowest Adolescent Health Survey data to inform work on growing students' sense of belonging and safety • 3.C.ii Use Connectedness Survey to inform work on student's sense of belonging and safety • 3.C.iii Engage professional learning on students' sense of belonging, including the analysis of DESSA and IST data
1.D Develop and expand digital literacy to empower students to thrive academically and navigate the digital world safely and responsibly. • 1.D.i Design and lead professional learning on balanced and intentional technology use • 1.D.ii Develop consistent home/school 1:1 program communication	2.D Redesign elements of the Physical Education and Health curricula to promote physical, social, emotional, and behavioral wellness • 2.D.i Revise the scope and sequence for the middle school Physical Education curricula to align with the SHAPE National PE Standards • 2.D.ii	3.D Examine the <i>Facilities Conditions Assessment Plan</i> to ensure infrastructure needs are met, including providing a safe, healthy, and accessible learning environment in all SPS school buildings. • 3.D.i Adjust the SPS Capital Plan as appropriate based on the <i>Facilities Conditions Assessment</i> and current conditions

● 1.D.iii Integrate AI Literacy lessons into Grade 8 Civics Digital Media Unit and DLCS courses	Create and implement inclusive middle school Adapted Health Education Curriculum aligned to MA Health Standards ● 2.D.iii Design, implement, and support delivery of K–2 health lessons aligned to MA Health Standards ● 2.D.iv Design grades 3–5 Health Education lessons aligned to Massachusetts health standards.	● 3.D.ii Implement and record a preventative maintenance plan ● 3.D.ii Fully utilize the work order system for all capital and maintenance needs; in turn, respond quickly to all reactive maintenance needs
	2.E Enhance collaboration and accessible communication with the SPS community to foster student success, build partnerships with families, and reduce barriers to inclusion. ● 2.E.i Calibrate conversations with families for clarity, consistency, and accessibility regarding student achievement ● 2.E.ii Gather feedback from families about current communication practices ● 2.E.iii Develop and implement a district-wide family outreach tool to strengthen connections and support the whole child. (For example; Family Information Form sent prior to beginning of each school year/families new to SPS) ● 2.E.iv Provide community workshops and events in partnership with PTOs/SEPAC to support the social emotional development of students.	

Definitions

Mission

A concise statement that defines the organization's core purpose—why it exists, who it serves, and what it seeks to accomplish every day. It guides daily actions and decisions in pursuit of the broader vision.

Vision

A clear and inspiring statement of the aspirations for students, describing what future success looks like for them and the school community.

Core Values

The fundamental principles and beliefs that guide decision-making and behavior. These values reflect what the community stands for and drive the actions needed to achieve the vision.

Equity Statement

A declaration of the district's commitment to equity, affirming its responsibility to identify and eliminate barriers to access, opportunity, and achievement. It reflects the belief that all students—regardless of race, background, identity, or ability—deserve the support they need to thrive.

Theory of Action

The set of beliefs and assumptions about how and why specific actions will lead to the desired vision. It explains the rationale behind the strategic plan and serves as the foundation for how change will happen.

Strategic Objectives

Broad, overarching goals that define the key areas of focus for achieving the vision. They outline what the district aims to accomplish and why these goals are essential for improvement.

Strategic Initiatives

Major programs, projects, or efforts that directly support the strategic objectives. They represent the how—the specific ways the district will work toward meeting its goals.

Action Steps

Detailed, sequenced tasks prioritized for implementation in the current school year. These steps define what will be done to carry out the strategic initiatives and move the district closer to achieving its long-term vision.

Action Plan

A detailed roadmap outlining the specific steps, timelines, responsibilities, and resources needed to implement the strategic initiatives. It turns broad goals into concrete, manageable actions within a set time frame.

- Action Plan Components:
 - Action Item - Define specifically what will be done;
 - Outcomes and measures - expected results and how they will be measures (SMART)
 - Resources - people, materials, time, and funding
 - Lead and Support for action item
 - Timeline - when action item will be completed or realized

**Sudbury Public Schools
School Committee Meeting**

Date: September 14, 2026

Agenda Item: 4d - School Committee Workshop - School Committee Goals

Recommendation:

Background / Preparation Information:

We will spend time in this workshop, working as a team to determine our goals for this year. Please review, prioritize and finalize a reasonable list of goals for the Committee for this year. We will review everyone's list in the meeting with the end goal of having a draft product.

Attachments:

SSC Goal Setting Template

Action: XX

Report:

Discussion: XX

Sudbury School Committee Goal Setting Template

Goal Area: Communication	Goal: Provide the community with information so they can understand and follow along with the work of the school committee			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Targets	EOY Deliverable (s)
Review SC website to determine if updates can improve public engagement and a positive user experience	Full for review, decisions and votes. One or two members to make the changes working with IT staff	Set up a FAQ page with highly discussed topics; who to contact, etc. Model our website after ? Provide links to SEPAC, LGBTQ+ PAC,	Review is completed Committee has determined changes/updates Vote on what changes to make	All Changes implemented
Continue offering office hours/listening sessions to engage with the public and offer a platform for feedback	Rotating committee members	Conduct 2-3 per year Targeted presentations to generate feedback Provide summary after each session	1 Listening session completed (Nov) Summary data presented	-2 additional listening sessions (jan and march) -Summary data presented -Overall summary of ways committee can improve based on any feedback from sessions

Review previous communication methods, surveys and reports to understand most and least effective practices	Full	Rank communication methods used over the past 2-3 years	Review is completed with report stating most and least effective methods	
Understand most effective communication methods	Full	Use report generated above to fine tune communication methods that are most effective	Generate list of most effective ways to communicate Identify new ideas	Communicate to the community using the top two most effective ways
Produce communications that update the community of the work of the committee in small digestible pieces at regular intervals	Rotating member tasked with creating content	Create Facebook page for posts only – no comments High Five communications Ways to communicate Policy updates that will impact families	Facebook page operational with minimum of one post Send out 2-3 high five (Send out policy)	Draft report regarding Facebook page usage Send out, analyze and report on parent survey regarding communication changes

2026-2027 Sudbury School Committee Goal Setting Template

Goal Area: Student Experience	Goal: Provide an environment where each student feels true belonging and is able achieve their highest academic ability level			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)
Comprehensive review of existing data on Wellness, MetroWest survey and (suggestions from district ?) from past three years	Full committee working with appropriate staff (Betsy Grams, Asst Super, etc.)	Collate data, review trends noted by district	Report provided at full SC meeting	
Determine what data we are lacking / ways to re-analyze data/collect new data	Full	Adjust/institute policies based on data review Suggest ways to collect missing data points		Generate new survey/methods of data collection/ analysis reporting
Review state level data to understand questions asked and inform our surveys/data collection	Full working with appropriate staff as needed	Adjust/institute policies based on data review Suggest new survey questions		Incorporate new questions into survey to be sent out 27-28

Monitor digital tech/ed tech using latest published research as guidepost due to relationship with mental health/educational achievement	Full	Review parent survey from Digital Balance 6/26 and district response Hear feedback from digital task force/district curricular team on outcomes from changes made this year	Report/presentation	Adjust/create policy based on information to improve student achievement

2026-2027 Sudbury School Committee Goal Setting Template

Goal Area: Financial Stewardship	Goal: Align district resources with educational priorities.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)
Review budget process from last year	Budget	Change timeline/increase communication between district and SC in order to increase efficiency and effectiveness of the process Increase communication with Town and District	Timeline determined by Oct 1 including when draft budgets are submitted to full committee	Make suggested changes for next year's budget process in March/April
Understand spending priorities and where to allocate money given budgetary constraints.	Budget sub	Allocate monies in budget for additional special ed staffing as needed	Incorporate into budget as needed	
Work with district to gather long term financial items i.e. curricular review, class	Full			

size guidelines, etc.				
Gather and review recommendations from educators and principals – i.e. special educator case load	Full	Stakeholder meeting in Sept/Oct	Incorporate wishlist into budget if possible	Recommend non-budgeted items for next year

Sudbury Public Schools School Committee Goals

Draft worksheet focused on School Committee governance responsibilities: oversight, reporting, policy, budget alignment, communication

Goal Area	Goal	Strategic Actions	Who Is Responsible	Outcomes and Deliverables	Mid-Year Targets	End-of-Year Deliverables
Academic Outcomes & Technology	Advance oversight of classroom technology use so digital tools are purposeful, developmentally appropriate, and supported by evidence of educational benefit.	Build on prior screen-time/minutes review; review an inventory of core instructional technology tools by grade/content; review/ request a framework for adoption/renewal that considers third-party evidence, student outcome data where available, accessibility/privacy, teacher use, developmental appropriateness, and non-screen alternatives; review family/community concerns through a structured forum.	School Committee: request framework/data, monitor findings, obtain/ review family/ community input regarding technology, and align budget/policy. Superintendent/Technology/Curriculum leaders: Inventory tools, document framework, evidence and usage.	Instructional technology inventory; review evidence of framework for adoption/ renewal of technology tools, completion of family/ community technology input forum. Review data at year end to inform future technology budget decisions.	(1) Completion of community technology forum to gather input.	(1) Review of technology inventory by grade/ content; (2) Framework reviewed for future educational-technology decisions (i. e. renewal and adoption of technology products); (3) Review with administration how technology inventory and approval framework informs FY budget/licensing decisions.
Academic Outcomes & Curriculum Quality/ Review Cycle	Monitor development of a predictable curriculum review cycle for all core subjects and specials.	Request a multi-year curriculum review calendar covering ELA, math, science, social studies, world language, etc.; clarify review criteria including standards alignment, student outcomes, gaps, equity/access, teacher feedback, materials, professional development, budget, and implementation timelines; review annual curriculum status report.	School Committee: set expectation, review schedule, monitor annual reporting. Superintendent/Assistant Superintendent: create schedule, review criteria, and recommendations.	Multi-year curriculum review calendar; annual curriculum status report; common curriculum review criteria/template.	(1) Present multi-year curriculum review schedule and review criteria presented to the Committee. (2) Review with administration budget implications of curriculum review priorities.	Suggestion for mid-year completion to incorporate curriculum needs into budget forecast.
Academic Outcomes & World Language Curriculum Review	Review world language program purpose, effectiveness, and future options.	Review existing/external world language review findings; request current K-8 scope, frequency, minutes, curriculum, staffing, and desired outcome such as exposure, cultural learning, or proficiency; review evidence of student retention/learning and family/staff/student feedback; explore options such as redesign, increased frequency, proficiency pathway, immersion/after-school enrichment, or reallocation of time.	School Committee: review curriculum review findings. Obtain family/ community input regarding world languages. Review world language models of surrounding districts. Superintendent/Assistant Superintendent/ Curriculum Admin/ Teachers: provide analysis and recommendations.	World language curriculum review summary and findings; Review of family/ community input regarding world language curriculum; Evaluation of future immersion/ after-school enrichment options, including budget, schedule, staffing, and student-experience implications.	(1) Review World Language Curriculum Review and any Existing Findings; (2) Obtain community feedback regarding world languages curriculum. (3) World language curriculum landscape/ review of surrounding districts	(1) Review direction/options with budget, resource, and schedule implications for the next planning cycle.
Academic Outcomes & STEM Program Evaluation	Evaluate feasibility of a STEM/technology special or strengthened STEM experiences.	Request an inventory of current engineering, coding, robotics, design thinking, and applied-science experiences embedded in current curriculum; review surrounding district models / options; develop pilot or phased implementation scenarios.	School Committee: request current STEM inventory, STEM programming feasibility review and budget scenarios. Review STEM models of surrounding districts. Obtain community input regarding STEM programming. Superintendent/Curriculum/Technology leaders: Establish an inventory of STEM related programming. Prepare an analysis and recommendations related to a STEM special	STEM/technology opportunity map; feasibility memo; pilot/phased options with staffing, schedule, space, professional development, and cost.	(1) Obtain community feedback regarding STEM curriculum. (2) STEM curriculum landscape/ review of surrounding districts,	(1) Review current-state STEM inventory and draft feasibility options presented, including staffing, schedule, and space constraints.(1) Recommended path for pilot, redesign, deferral, or further study, with costed scenarios for budget planning.
Academic Outcomes & Curriculum Quality	Monitor K-8 ELA Implementation and evaluate the middle school blended ELA model	Continue to monitor evidence/rationale comparing the educational effectiveness of the adopted/purchased curriculum model with the blended homegrown + purchased model; review student growth, benchmark/MCAS indicators, subgroup trends, intervention data, teacher implementation feedback, and professional development/resource needs; identify the decision point for continuing or revising the model.	School Committee: set oversight expectation, receive/review reports. Superintendent/Teaching & Learning: prepare reports/recommendations and manage implementation.	Middle school ELA coherence/rationale memo; data review; identified budget, professional development, staffing, or materials implications.	(1) Obtain educator / community/ administrator input regarding the ELA curriculum	(1) Committee receives evidence of student performance/intervention indicators, and clear criteria for evaluating the blended model. (2) Year-end recommendation/report on whether to continue or revise the middle school blended approach, with budget, professional development, and staffing implications documented.
Resource Stewardship & Student Support Alignment	Update class size/resource guidelines to reflect staffing-review triggers and student support context.	Request revised Class Size, Sectioning, and Student Support Guidelines; include review triggers such as enrollment, IEP/504 service needs, English learner needs, intervention demand, behavior/climate, cohort complexity, room capacity, late enrollment, specialist caseloads, and budget constraints; define response ladder: monitor, rebalance, add classroom support, add intervention/specialist support, open a section, assign future new enrollment, or make a budget request; include privacy guardrails.	School Committee: review/adopt guideline and use it in budget oversight. Superintendent/Finance/Student Services/Principals: provide aggregate data and recommendations.	Revised class size/resource guideline; public-facing FAQ; annual class size/support report template; documented review-trigger framework.	(1) Draft revised guideline and review-trigger framework presented during budget development, with examples of how the framework would be applied. (2) Obtain educator / community/ administrator input regarding class size, specialist caseloads, etc.	(2) Guideline finalized; class size/support report template ready; framework used in budget narrative and future staffing/support discussions.
Resource Stewardship & Student Support Alignment	Monitor student-support staffing and caseload capacity as part of budget oversight.	Request aggregate caseload and capacity data for special education, interventionists, English learner support, counselors/social workers/psychologists, related services, paraprofessionals/assistants, and behavior support; review whether caseloads/service models are sustainable and aligned to student needs; connect findings to class-size and budget discussions.	School Committee: receive/review aggregate data and align budget oversight. Superintendent/Student Services/Finance: prepare privacy-protected data, risk analysis, and recommendations.	Student support/caseload dashboard; budget implications; staffing-risk summary; public explanation of push-in, pull-out, program-based, and student-specific support models.	(1) Review aggregate caseload dashboard with budget pressure points, service-model explanations, and risk areas identified.(2) Review staffing/support capacity report to informs FY budget	Suggestion for mid-year completion to incorporate curriculum needs into budget forecast.
Communication Quality & Committee Presence	Improve communication quality by providing short, digestible recaps and targeted issue briefings.	Create regular concise recaps of key Committee decisions/discussions; test formats such as email summary, webpage update, incorporation of School Committee updates in existing district/ school communications, or meeting highlights; use targeted 5-10 minute presentations to introduce complex topics such as technology, class size, ELA, world language, or budget drivers; review engagement metrics and recurring questions.	School Committee: Set scope/tone/ communication plan. Superintendent/communications support: assist with logistics and publication. Individual members participate consistent with Open Meeting Law.	Communication calendar; recap format; targeted issue briefing template; communication effectiveness metrics report.	Pilot at least two recap/briefing formats and review open rates, views, attendance, repeated FAQ themes, and qualitative feedback.	Adopt/refine preferred communication rhythm and formats based on effectiveness metrics and community understanding.

Communication Quality & Committee Presence	Strengthen School Committee presence in schools/community settings	Consider PTO/school liaison roles; identify opportunities such as Read Across America, school events, budget forums, and school-based conversations; create listening session protocol clarifying purpose, roles, confidentiality limits, public-comment boundaries, follow-up, and Open Meeting Law considerations; use themed listening sessions while preserving the ability for community members to raise other topics. Establish a periodic/ semi-annual labor relations/ SEA communication mechanism.	School Committee: own liaison norms and listening protocol. coordinate communication / event calendar. Superintendent/admin: support logistics and legal review as needed.	Communication calendar; listening session protocol; annual presence/participation summary; process for summarizing themes heard.	Protocol adopted; liaison calendar in place; at least two school/community touchpoints completed and summarized.	Year-end summary of sessions/events, themes heard, participation metrics, and recommended adjustments for the following year.
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20260611 Sudbury School Committee Goal Setting- J. Durgin- Draft Input

Goal Area: Communication / Community Engagement	Goal: Improve trust and clarity by strengthening two-way communication and consistently “closing the loop” with families, staff, and the broader community.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Targets	EOY Deliverable (s)
1. Establish a predictable “close-the-loop” practice: publish a brief “What we heard / What we decided / Why” after high-interest votes. 2. Improve meeting accessibility & predictability: consistent packet timing, clear agenda language, and easy-to-find decision memos/FAQs on key topics. 3. Hold two structured listening sessions (with clear scope, facilitation, and follow-up commitments).	Full Committee (governance expectations and oversight) Chair + Superintendent (cadence, publication, and operational coordination) • Optional Comms/Engagement subcommittee	• Archive of “close-the-loop” communications after major decisions. • Two listening sessions completed with published summaries/themes and documented follow-up actions. • Public-facing FAQs and/or decision memos for priority topics (e.g., budget, superintendent search, student experience). • Participation indicators (attendance, submissions, survey pulse where available).	• Listening Session #1 held; summary published within 2–3 weeks. • At least two “close-the-loop” communications published post-vote. • First set of FAQs/decision memo(s) posted for a high-interest topic.	• Listening Session #2 held; summary published. • Year-end “You said / We did” compilation (top themes, actions taken, what remains). • Updated participation/hybrid meeting practices documented (if changes were made).

Goal Area: Understanding Student Experience (Academic + Belonging) / METCO	Goal: Strengthen the Committee's shared understanding of student experience (academic progress and belonging) and ensure METCO students/families are supported using clear evidence and responsive action.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)
1. Request a "Student Experience Snapshot" 2x/year (academics + belonging/climate + subgroup lens, including METCO as appropriate). 2. Establish a consistent mechanism for student/family voice with guardrails (scope, confidentiality, and follow-up) and publish a summary of themes. 3. METCO: strengthen start-of-year connections (e.g., Boston back-to-school welcome event) and clarify communication pathways for families. 4. METCO transportation: review ride-time	• Superintendent + district leadership team • METCO Director/Coordinator; Principals • Full Committee (requests/review and governance oversight) • Optional Student Experience liaison • (Julie D. can assist with Boston welcome event coordination in partnership with district staff)	• Student Experience Snapshot #1 and #2 delivered (public-facing where appropriate). • Student/family voice themes documented plus a "what we're doing" response. • METCO engagement artifacts: welcome event execution + communication plan/touchpoints. • Transportation summary: baseline ride-time info, pilot learnings, and options with costs and student impact considerations.	• Snapshot #1 presented and discussed (baseline + priority questions). • Boston METCO welcome/connection event completed (start-of-school timeframe) and participation documented. • Transportation update delivered with early observations and clear next steps.	• Snapshot #2 delivered with trend discussion and actions taken. • METCO year-end summary: supports implemented, what improved, remaining barriers, and recommendations for next year (including transportation).

experience and options (pilot bus learnings; stop consolidation; cost/benefit; student impact). 5. Identify and monitor key barriers (e.g., food insecurity) and coordinate awareness of available supports/partnerships.				
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Goal Area: Financial / Resource Stewardship	Goal: Strengthen fiscal transparency and long-range planning so the community understands tradeoffs and the district aligns resources to student outcomes.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)
- Adopt budget principles aligned to district priorities (what we protect first; equity lens; capacity/class size considerations as applicable). - Require a multi-year financial forecast with	- Superintendent + Business/Finance Office (analysis and materials) - Full Committee (principles,	- Published budget principles and decision criteria. - Multi-year forecast and scenarios presented publicly with assumptions documented.	- Budget principles approved and used in at least one key decision discussion. - Forecast/scenarios delivered and discussed in open session.	- Final public-facing budget explainer and forecast package posted. - Year-end summary: financial decisions made, results, key risks/pressures for

scenario planning (key drivers, risks, triggers, and decision points). 3. Improve public-facing explanations of major cost drivers and tradeoffs (plain-language “budget story”). 4. Coordinate at least one structured joint discussion with Town partners (Select Board/FinCom) focused on shared constraints and solutions.	oversight, and communication expectations) Town partners (Select Board/FinCom) for joint session(s)	- Plain-language budget explainer materials (FAQ/deck/narrative). - Evidence of clear tradeoff communication: what changed, why, and student impact considerations.	Draft public-facing budget explainer produced.	next cycle, and planned mitigation strategies.
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Goal Area: Superintendent search	Goal: Conduct a transparent, inclusive, and legally sound Superintendent search that builds community confidence and sets the next leader up for success.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)
1. Approve and publish a search process plan (timeline, roles, confidentiality,	- Full Committee (ultimate responsibility) - Search subcommittee (if formed)	- Public search process plan, timeline, and communications cadence. - Stakeholder input summary (themes) and	- Search plan approved and posted. - Stakeholder input collected and	Superintendent selected/appointed (as applicable) and transition plan communicated.

communications cadence, and decision criteria). 2. Collect structured stakeholder input (families, staff, students as appropriate, Town partners, and METCO families) and publish a themes summary. 3. Publish a leadership profile/criteria document showing how input shaped the desired competencies and priorities. 4. Prepare transition/onboarding expectations for the selected leader (first 90-day listening plan plus early priorities and deliverables).	• Search consultant and legal counsel (process support/compliance)	published leadership profile/selection criteria. • Documented decision process artifacts (rubrics/criteria, where appropriate). • Transition/onboarding plan for selected candidate (first 90 days + listening plan).	themes summary published. • Leadership profile/criteria published before finalist stage (as feasible).	• Published first-90-days priorities and listening plan to support community confidence and stability.
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Sudbury School Committee Goal Setting Template - KJ

Goal Area: Family, Community Engagement & Belonging	Goal: Strengthen trust, transparency, collaboration, and belonging by expanding opportunities for meaningful family engagement, supporting advisory partnerships, improving communication practices, and establishing a process for long-term strategic planning.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Targets	EOY Deliverable (s)
Review progress toward recommendations from the 2022 Equity Audit and determine whether an updated Equity Audit is warranted.	Full Committee	Status report and discussion of future audit needs	Review completed and outstanding recommendations	Determine next steps regarding future equity review efforts
Evaluate district and School Committee communication practices, including At-A-Glance publications, website usability, principal communications, superintendent communications, meeting packet access, and family engagement surveys. Apply for a grant / budget allocation to support a District Communications Audit	Full Committee, Communications Liaison, Communication Subcommittee Budget Subcommittee, School Committee, Administration	Identification of strengths and opportunities for improvement Submit grant application(s)	Review communication practices and available feedback Submit grant application(s)	Develop recommendations to improve accessibility and clarity Communications Audit in progress or completed; If not accepted, work on including it into FY28 Budget
Develop processes to strengthen communication, collaboration, and participation among PTOs, SEPAC, the LGBTQ+ PAC, METCO stakeholders, School Councils, and other advisory groups by identifying and reducing barriers to involvement and exploring	Full Committee / Administration	Increased awareness of participation barriers; implementation of strategies to broaden engagement and representation; participation data where available.	Review current participation practices and identify barriers and opportunities to increase engagement.	Establish and evaluate communication and engagement practices designed to improve accessibility and participation across advisory groups.

more accessible and inclusive engagement practices. Consider factors such as meeting times, virtual or hybrid participation options, childcare needs, language access, transportation, outreach practices, and awareness of opportunities to ensure a broader range of families can participate in school and district decision-making. Explore opportunities to incorporate advisory group meetings, family engagement events, and community educational programs into district communication channels, including Friday Flyers, newsletters, and district calendars.	School Committee/ Administration	Increased visibility of engagement opportunities	Identify or pilot communication practices	Review pilot and discuss how to move forward next fiscal year
Review implementation of Policy KBE and identify opportunities to support PTOs and booster organizations in planning inclusive and accessible events, fundraising activities, and volunteer opportunities.	Full Committee, PTO Co-Chairs, Combined Facilities Director/ADA Coordinator, Administration	Supporting Sudbury Public School affinity groups	Combined Facilities Director/ADA Coordinator provides presentation to the School Committee on best practices in planning an accessible event, fundraising activities, and volunteer opportunities	Review feedback from affinity groups
Continue collaboration with SEPAC and LBGTQ+ PAC and other advisory groups to elevate family perspectives and strengthen inclusive practices.	Full Committee	Advisory input reflected in committee discussions	Receive updates from advisory groups	Review themes and future opportunities
Develop a process, timeline, and stakeholder engagement plan for district strategic planning.	Full Committee / Superintendent	Strategic planning framework and timeline	- Discuss planning options and stakeholder engagement process	Establish strategic planning timeline and next steps

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2026-2027 Sudbury School Committee Goal Setting Template

Goal Area: Student Learning, Achievement & Student Supports	Goal: Strengthen School Committee oversight of curriculum, student outcomes, instructional practices, inclusion, and student support services to ensure all students have equitable access to high-quality learning experiences.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)
For the Sudbury School Committee to better understand what METCO goals and initiatives were completed in FY26 and FY27, program success, opportunities for growth, and plan to strengthen the program.	METCO Director, Interim Superintendent, Full Committee	Increased understanding of METCO program, budget allocation and planning considerations	Summer, review annual report/progress report of FY26 METCO goals January, Mid-Year progress update of FY27 goals	Annual Report presented to School Committee and METCO families regarding program goals and next steps.
Review how METCO programming and staffing are reflected within the SPS budget and long-range financial planning to better understand resource allocation and program sustainability.	Budget Subcommittee / Director of Business and Human Resources; Full Committee		Review budget information related to METCO, program, and ways to ensure proper staffing related to this program is accounted for in the budget	
Review and potentially adopt Policy IA (Instructional Development Goals).	Policy Subcommittee / Full Committee	Updating/adoption of policy establishing instructional priorities	Review draft policy language	Potential Adoption of Policy IA
Review implementation of Policy JBB (Educational Equity) and assess whether the data currently reviewed by the School Committee are sufficient to evaluate equitable access, experiences, and outcomes for all students. Consider whether there are additional data sources, indicators, or feedback mechanisms that	Policy Subcommittee / Full Committee	Updating/adoption of policy	Review draft policy language	Potential Adoption of Policy IA

Receive updates regarding inclusive instructional practices and supports that promote access to learning in the least restrictive environment, including better understanding	Full Committee / Director of Student Services	Understanding of inclusive instructional practices, successes and opportunities of growth	Receive update from Director of Student Services	Receive end of year update from Director of Student Services during or as part of Academic Benchmarking presentation
Examine the impact of educational technology on learning, executive functioning, digital wellness, and accessibility.	Full Committee	Discussion informed by district and community data	Mid-year review	Identify future considerations
Review district efforts related to disability awareness, bullying prevention, and fostering positive school climate.	Full Committee	Presentations and program updates	Review current efforts	Identify future prio
Review Extended School Year (ESY) programming updates and implications of recent program changes.	Full Committee	Program review, feedback, and plan on ensuring how all families whose students are recommended for ESY can access and participate in ESY programming	Receive ESY update from summer 2026 and compare attendance and participation over past three years. Identify planning considerations for 2027 ESY program.	Review 2027 ESY programming and enrollment projections

2026-20267 Sudbury School Committee Goal Setting Template

Goal Area: Fiscal Stewardship, Facilities, Workforce Sustainability & Student Access	Goal: Provide responsible oversight of district finances, facilities, staffing, and operational resources while supporting equitable access to educational, enrichment, and student support opportunities.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)
Review implementation of Policy KF (Use of School Facilities), and determine whether revisions are warranted.	Budget Subcommittee / Director of Business and Human Resources; Full Committee	Policy review and recommendations	Receive implementation update & Draft Policy, if amendments recommended	Adoption of Policy KF; Receipt of process and procedure on how Policy will be implemented
Access after-school facility utilization and		Data & Recommendations	Memo to School Committee about	Recommendation of Budget

opportunities for expanded student and community use. Possible exploration of partnerships with organizations to expand enrichment opportunities.			work to-date	Subcommittee presented to School Committee to be voted upon
Review transportation survey results regarding increasing access to Sudbury after-school care providers and enrichment opportunities outside of the school buildings	Budget Subcommittee / Director of Business and Human Resources; Full Committee	Data & Recommendations	Memo or presentation to School Committee about work to-date	Recommendation of Budget Subcommittee presented to School Committee to be voted upon
Review staffing trends, vacancy data, recruitment efforts, and retention challenges. Monitor implementation of workload and caseload review procedures established through collective bargaining. Consider implications of staffing and resource allocation decisions on inclusive educational practices and student access.	Budget Subcommittee / Director of Business and Human Resources; Full Committee	Updates regarding implementation and outcomes	Receive implementation update	Review outcomes and future considerations

Sudbury School Committee Goal Setting Template

Goal Area: Communication/Community Engagement	Goal: The Sudbury School Committee will foster trust, transparency, and collaboration by strengthening relationships with families, educators, and the broader community through inclusive engagement practices, open communication, and responsible action.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Targets	EOY Deliverable (s)
Listening Sessions	Two Members	Attendance Logs Summary of main points discussed at full meeting. Continue to have both virtual and in-person opportunities.		
Create a Facebook page where it is post only and closed for comments	Communications Liaison	Post information that is posted on website and in emails See how many people follow to determine interest		
Create easy to read graphics or summary of each school committee meeting (5 important takeaways, Top 5 list).	Communications Liaison	Post on website, Facebook page and send email (or include it in other district emails)		

Have a presence at community events	School Committee			
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2025-2026 Sudbury School Committee Goal Setting Template

Goal Area: Understanding Student Experience	Goal: The Sudbury School Committee will deepen its understanding of the student experience by actively listening to students, seeking diverse perspectives, and using student-centered insights to inform decision-making.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)
Conduct student surveys to better understand school climate, students' sense of belonging, and their feelings of safety.	School Committee Superintendent	Data from Surveys		

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2025-2026 Sudbury School Committee Goal Setting Template

Goal Area: Conduct Search for a New Superintendent	Goal: Conduct a transparent and community-informed Superintendent search process that engages stakeholders and builds trust in the selection of the district's next leader.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)
Determine the extent of staff and community involvement	School Committee	Create community goals and objectives – what do we want from a Superintendent Create Community Focus Groups Create Search Committee Create a Timeline		
Determine if we are using a search consultant	School Committee	Get quotes		

Answer many of the questions on page 17 and 18 of the MASC document “Looking for a Leader”	School Committee	Decide as a group how we want to proceed		

2025-2026 Sudbury School Committee Goal Setting Template

Goal Area: Financial/Resource Stewardship	Goal: Ensure the long-term fiscal health of Sudbury Public Schools by strengthening the School Committee's ability to align operating and capital budgets with instructional priorities, equity goals, and the long-term maintenance and capacity needs of district facilities.			
Strategic Actions	Who is Responsible (Full, Sub, Etc.)	Outcomes & Deliverables (Evidence & Data)	Mid-Year Deliverable(s)	EOY Deliverable (s)

Develop a sustainable budgeting framework that balances immediate operational needs with long-term financial obligations, capital investments, and district priorities. This needs to be presented to the community in multiple ways. For example, in my old district the Superintendent and Financial Director would go on “Budget Roadshows” presenting the budget in every PTA meeting in every school in the district. Another was is that they broke down segments of the budget (it was too long to do in one meeting) and presents parts of it in School Committee meetings (I believe there was a total of 4).	School Committee Superintendent Facilities Director Administration	Short and long-term Capital Plan.		
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**Sudbury Public Schools
School Committee Meeting**

Date: **September 14, 2026**

Agenda Item: 4e - Delegate Communications Liaison to write letter to Carmine Gentile

Recommendation:

Motion to delegate the communications liaison to draft a letter of thanks to Representative Carmine Gentile for his gift of \$50,000.

Background / Preparation Information:

Representative Carmine Gentile is retiring from the Massachusetts House of Representatives this coming November. He has gifted our school district \$50,000 and if the Committee approves, we could delegate Karyn, our Communications Liaison, to draft a thank you letter for us to send to him. Please bring any questions or ideas for what you would like to see in the letter.

Attachments:

Action:	XX	Report:	Discussion:	XX
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**Sudbury Public Schools
School Committee Meeting**

Date: September 14, 2026

Agenda Item: 4f - Superintendent Search Updates

Recommendation:

Motion to approve (firm name) to aid the School Committee in their search for a Superintendent.

Motion to appoint (two names) to the Screening Committee.

Motion to appoint (name) as the point of contact with the search firm.

Background / Preparation Information:

We received proposals from 4 search firms and the Evaluation Committee reviewed and scored the 4 proposals. Please review the memo from Buck and bring any questions. I anticipate a potential vote to approve a search firm. We will also discuss and potentially vote on which School Committee members to add to the Screening Committee and which School Committee member will be the point of contact to the search firm.

Attachments:

SPS Superintendent Search Firm updates for SC 14 Sep 26

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



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Buckner Creel

Acting Director of Business and HR

buckner_creel@sudbury.k12.ma.us

To: School Committee
From: Buckner Creel
Acting Director of Business and Human Resources
Date: September 9, 2026

Re: **Superintendent Search Firm – RFP Results**

1. Following the announcement of Superintendent Brad Crozier's resignation, and the appointment of Interim Superintendent Annette Doyle, the School Committee considered several approaches to conducting the search for the next Sudbury superintendent. At its meeting on July 20th, the Committee agreed to seek the services of a superintendent/executive search firm, discussed desired services, then directed me to draft a Request For Proposals (RFP) and bring a draft back to the Committee for their review. At their meeting on August 17th, the Committee reviewed the draft RFP, made some revision, approved the release of the RFP to hire a consultant, and directed me to send the RFP to at least four firms whose habitual practice included superintendent searches. The Committee appointed Jessica McCreedy and Ellen Lederer-DeFrancesco as the Committee's members, and directed the administration to provide two members, to evaluate responses to the RFP.
2. The RFP was released on August 19th, with responses due at 1:00 PM on Friday, September 4th. Technical and price proposals were requested from four firms: the Massachusetts Association of School Committees (MASC); the New England School Development Council (NESDEC); Hazard, Young, Attea and Associates, Ltd. (HYA); and the Collins Center of UMass Boston (Collins Center). All four firms responded before the proposal receipt deadline. All responding firms are considered responsible and responsive.
3. The four evaluators were provided initially with the technical proposals later that afternoon, and working separately over the next several days scored the proposals against the criteria outlined in the RFP. The evaluators met on September 9th to discuss their scoring. It quickly became apparent that two firms scored higher than the other two, who were dropped from further consideration. After some discussion, it became apparent that one firm provided some advantages to the Committee's search effort, the Collins Center.
4. At this point, the price proposals for the two finalist firms were reviewed to see if both covered the anticipated services. The Collins Center provided a fixed price fee of \$24,000, and the evaluators finally agreed to recommend that the Committee VOTE to award an agreement to the Collins Center in the amount of \$24,000.

Buckner Creel
Acting Business Director



Sudbury Public Schools

40 Fairbank Road
Sudbury, MA 01776

SUPERINTENDENT SEARCH FOR SUDBURY PUBLIC SCHOOLS

Request for Proposals from Executive Search Firm or Consultant

RFP#: 27-001

Proposal Due Date: September 4, 2026 – 1:00 PM

Proposal Opened At: Sudbury Public Schools
Business Office
40 Fairbank Road
Sudbury, MA 01776

Contact

Buckner Creel
Acting Director of Business & Human Resources
40 Fairbank Road
Sudbury, MA 01776
buckner_creel@sudbury.k12.ma.us

SUPERINTENDENT SEARCH FOR SUDBURY PUBLIC SCHOOLS REQUEST FOR PROPOSALS FOR EXECUTIVE SEARCH FIRM

The School Committee for Sudbury Public Schools hereby requests proposals from qualified firms or individual consultants to provide Executive Search Consultant Services for the position of Superintendent for the Sudbury Public Schools (SPS) system. This request is being issued under Massachusetts General Laws Chapter 30B. To ensure that the School Committee obtains the most qualified firm or individual consultant that can most effectively deliver the required services, the School Committee requests formal proposals as set forth below.

Proposal will be received until 1:00 PM on September 4, 2026, by email instructions below, or in person at the following address:

Sudbury Public Schools
Business Office
40 Fairbank Road
Sudbury, MA 01776

Inquiries involving procedural or technical matters related to the Request for Proposals shall be submitted in writing to buckner_creel@sudbury.k12.ma.us and received no later than three (3) business days prior to the time the proposals are due.

Please be advised that this search will go at an accelerated rate, with the goal of finalizing an appointment by January 15, 2027. Interested firms or individuals, therefore, must be willing to commit the necessary staff resources to accommodate that appointment timeline. The School Committee reserves the right to reject or accept any proposal based on criteria established at its sole discretion.

Projected/Desired Timeline:

- Interviews (if necessary) with selected proposers may be scheduled the week of September 8 (via Zoom)
- Contract award is anticipated on or before Wednesday, September 16.
- Contractor to post position statement and work with School Committee and Screening Panel in late September to early-October 2026.
- Superintendent Candidate interviews with Screening Panel are anticipated in late-October 2026.
- Finalist interviews with the School Committee are anticipated in November 2026.
- Superintendent job offer anticipated in mid-December 2026 with a start date in July 2027.

Based on its review of proposals received by September 4, 2026, the Evaluation Committee may invite a small number of selected firms or individuals to meet with it during the week of September 9-11, 2026. A final determination/award will be made by September 16, 2026 and is subject to Sudbury School Committee approval.

PROPOSAL SCHEDULE – KEY DATES

- | | |
|---------------------------------------|----------------------|
| 1. Request Distributed | August 19, 2026 |
| 2. Vendor Questions Due | September 1, 2026 |
| 3. Questions Answered in Writing | September 2, 2026 |
| 4. Responses due by 1 PM | September 4, 2026 |
| 5. Interviews by Evaluation Committee | September 8-10, 2026 |
| 6. Proposal selected | September 16, 2026 |

I. Scope of Services

The responsibilities of the selected firm will include the following:

- 1) Assist the Search Committee in conducting a search that generates a diversified pool of highly qualified candidates, including women and people of color.
- 2) Create a plan and a timeline of recruitment and hiring activities for the consideration of the School Committee.
- 3) Work with the Sudbury School Committee, senior staff and designated Screening Panel to identify the traits and management style desired in a new Superintendent. Review the position requirements and solicit opinions from various stakeholders, including School Committee members, SPS staff, parents, elected or appointed Town officials, and members of the Sudbury community beyond the school community, to help the School Committee define the leadership needs of the school district. This process will include as many as **six (6) meetings** with different stakeholders facilitated by the consultant.
- 4) Present findings and recommendations garnered from stakeholders' interviews in a written report to the School Committee, and assist the School Committee in identifying the district leadership needs and establishing selection criteria for a new Superintendent
- 5) Work with the School Committee and/or SPS staff to develop descriptive documents and/or marketing materials for prospective applicants.
- 6) Conduct networking and other active search activities to generate a broad and diverse pool of highly qualified prospective candidates who meet the School Committee's selection criteria. Identify and solicit applications from superior candidates locally and regionally.
- 7) Maintain communication with candidates and respond to certain candidate inquiries and information requests.
- 8) With the Screening Committee, screen the initial applicant pool and provide a report on each applicant, using criteria established by the School Committee. The Proposer shall provide the School Committee with a report on the demographic composition (including gender and race/ethnicity) of the applicant pool, semi-finalists, and finalists at each stage of the search.
- 9) Conduct reference and background checks including the nature and content of the background checks on all interviewees, as required, including extensive reference checks on two to three finalists.
- 10) Provide advice and direct assistance to the Screening Committee in the overall conduct of the search, including the interview process.
- 11) Assist the Screening Committee staff in coordinating candidate interviews and making necessary arrangements for candidate travel and accommodations.
- 12) Continue to work on this assignment through the hiring of a Superintendent, and assist the School Committee with the development of an alternative plan in the event the search process does not produce a candidate acceptable to the School Committee.

- 13) Provide the School Committee with a written confidentiality protocol governing the treatment of candidate identities and application materials throughout the search, given that sitting superintendents and other high-level candidates may require assurance of confidentiality before applying.
- 14) Perform other related services in the conduct of the search.

II. Submission Guidelines

This solicitation shall not be construed in any manner to be an obligation by SPS to enter into an agreement with any vendor.

The School Committee reserves the right to reject any or all responses in its sole discretion. The School Committee may negotiate the terms of the contract including revisions to the scope of the work with the selected vendor prior to entering into a contract.

The School Committee reserves the right to revise in part this RFP by issuing one or more addenda to each of the respondents. If the School Committee cancels or revises this Request, all respondents will be notified by addenda. The School Committee also reserves the right to extend the date responses are due.

Statements of interest and any other information submitted in response to this Request shall become the property of the School Committee. Notwithstanding any indication by Respondent of confidential contents, and with the exception of bona fide confidential information, contents of responses are public documents subject to disclosure under the Massachusetts Public Records Law after the completion of the selection process.

The School Committee will not provide compensation to Responders for any expenses incurred by Responders for response preparation or for any demonstration or participation in their selection process that may occur. Contractors submit responses at their own risk and expense.

The Sudbury School Committee reserves the right decline to hire any of the candidates provided by the consultant, and the right to hire a candidate not recommended or provided by the consultant.

III. Proposal Submission Requirements

Failure to submit documents requested may result in the School Committee's determination that a proposal is non-responsive unless the Town of Sudbury, acting through its School Committee, deems such a failure to be a minor informality.

There are two components to the Proposal: A Technical Proposal, including information about the proposer, references, and the services to be provided; and a Price Proposal, including a fixed price fee for services to be rendered under the terms of the contract.

Technical Proposal

The following documentation must be contained in the Technical Proposal to prove responsiveness for each required element. Technical Proposals received without the required documentation for each required element may be deemed unresponsive.

Technical Proposals must be arranged in the order specified below, with responses and documentation separated by tabs or index dividers. Each page of the Technical Proposal must contain footer with the page number.

Required Elements of the Technical Proposal

- **Table of Contents**, showing where required information can be found by section and page
- **Letter of Interest**, including the firm's history and the name of the principal or "lead consultant" who will be the person assigned to work directly with the School Committee on this search. Proposers are directed to note that the contract will require that the same principal or "lead consultant" be assigned to this contract for the duration of the search process, through and including the hiring of a Superintendent for the Sudbury Public Schools.
- **Organizational Chart**, if the Proposer is a firm or corporation, indicating the name and position of all consultants who will work with the Sudbury School Committee on this search. If the Proposer is not a firm or corporation, the Proposer should state so in this section.
- **Current Resume(s)**, including summaries of credentials and number of years of experience providing executive search services, for all consultants who will be assigned to work with the Sudbury School Committee on this search.
- **Description of the Proposer's Approach and Plan** for performing the services outlined in the Scope of Work, including:
 - a description of how the Proposer will specifically identify and target the needs of the District in the search for a new Superintendent of Schools;
 - a description of the consultant's approach to ensuring community involvement and input;
 - a description of proposed candidate recruitment strategies;
 - a description of any onboarding, transition, or coaching support services the Proposer offers following the Superintendent's hire
 - a description of the consultant's proposed implementation plan; and
 - a proposed timeline with specific milestones.
- **List of Recent Contracts**, including name, address and telephone number, of all school districts or communities for which the firm has provided similar executive search services during the past five (5) years.
- **References**, for a minimum of five (5) comparable executive search projects completed in the last five (5) years, including at least one (1) reference from a school district with a minimum of five (5) schools and a minimum student population of 2,000, with the following information for each:
 - Client's name and address
 - Name, email address and phone number for at least one primary contact for each client
 - Dates of service to the district
 - Number of students in the district

- Geographic Reach, including a description of the Proposer's typical search geography and data on the geographic origin of candidates placed in the Proposer's five (5) most recent Superintendent searches
- **Promotional Material**, include advertisements, brochures, and other recruitment materials used in Superintendent searches or promotional literature about the firm
- **Signed Non-Collusion Form and Tax Compliance Certification** (Included as Forms in this RFP)

Required Element of the Price Proposal

The Price Proposal Form, included as Attachment A, must be completed and included as the proposer's Price Proposal to prove responsiveness to this requirement.

Price Proposals shall remain in effect for 60 (sixty) calendar days from the date of the proposal submitted or until it is formally withdrawn, a contract is executed, or this Request for Proposals is cancelled, whichever comes first.

Price Proposals submitted without the required form, or including other conditions of pricing may be deemed unresponsive.

PROPOSAL SUBMITTAL

Technical and Price Proposals shall be submitted electronically to buckner_creel@sudbury.k12.ma.us with the email title: "Sudbury Public School's Executive Search RFP Response 2026". Hard copy Proposals may be submitted by the deadline at Sudbury Public Schools, Business Office, 40 Fairbank Road, Sudbury, MA 01776 and must include an electronic version as described below.

If electronically submitted, applicants must complete and combine each Proposal (Technical and Price) separately in single, unrestricted PDF formatted files. Applicants must fill in all required fields and signatures either digitally or manually (print, fill-in, and scan to PDF). If physically submitted, the price and non-price proposals must be in separately sealed envelopes.

Any amendment to the RFP shall be issued through written addenda and sent by email notification to every individual or firm on record as having received the RFP documents. Hard copies of addenda will not be mailed or faxed. It shall be the sole responsibility of the Applicant to ascertain the existence of any and all addenda. Failure of any Proposer to receive any addendum shall not relieve such proposer from any obligation imposed by such addendum.

Timely submission of Proposals shall be the full responsibility of each Proposer. It is also the Proposer's responsibility to ensure that their Proposals are 100% true, complete, and accurate.

It is the proposer's sole responsibility to submit the proposal before the deadline.

EXAMINATION OF DOCUMENTS

Each Proposer shall be satisfied as to the requirements of the contemplated services to enable the intelligent preparation of this proposal. The Proposer shall be familiar with all submittal and RFP requirements before submitting the proposals in order that no

misunderstanding shall exist in regard to the nature and character of the contemplated services to be performed. No allowance will be made for any claim that the proposal is based on incomplete information as to the nature and character of the contemplated service.

IV. EVALUATION OF PROPOSALS

Technical Proposals will be evaluated by an Evaluation Committee who will individually rate the proposals. Evaluation of Technical Proposals will be based on weighted, comparative criteria described in this section. The following scale will be used to evaluate each criterion, as well as to determine a composite rating for each proposal:

Highly Advantageous
Advantageous
Not Advantageous
Unacceptable

Proposer's Experience

Highly Advantageous: The Proposer has five (5) more years' experience in conducting successful executive searches with public school systems, other educational institutions, and other non-profit organizations, and during the past five (5) years has concluded at least three (3) successful searches for a School Superintendent in Massachusetts, one (1) of which must have been for a district of similar size and demographics as Sudbury.

Advantageous: The Proposer has at least three (3) years' experience in successful executive search and hiring processes and has concluded at least two (2) successful executive searches for Superintendents with Massachusetts public school systems.

Not Advantageous: The Proposer has fewer than three (3) years' experience in successful executive search and hiring processes and has concluded only one successful executive search for a Superintendent.

Unacceptable: The Proposer has fewer than three (3) years' experience in executive search and hiring processes and has not concluded any successful searches for a Superintendent.

Proposer's Capacity

Highly Advantageous: The Proposer has more than three (3) consultants on staff to perform Superintendent searches.

Advantageous: The Proposer has more than two (2) consultants on staff to perform executive searches.

Not Advantageous: The Proposer has two (2) consultants on staff to perform executive searches.

Unacceptable: The Proposer only has one (1) consultant on staff to perform executive searches.

Key Personnel

Highly Advantageous: The Proposer's lead consultant has more than five (5) years' experience conducting Superintendent searches in Massachusetts.

Advantageous: The Proposer's lead consultant has at least three (3) years' experience conducting Superintendent searches in Massachusetts.

Not Advantageous: The Proposer's lead consultant has fewer than three (3) years' experience conducting Superintendent searches in Massachusetts.

Unacceptable: The Proposer's lead consultant has no experience conducting Superintendent searches in Massachusetts.

Proposer's Approach to Ensuring Community Involvement

Highly Advantageous: The Proposal provides more than three (3) project examples where the proposed Lead Consultant for Sudbury Public Schools Superintendent Search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a School Superintendent.

Advantageous: The Proposal provides three (3) project examples where the proposed Lead Consultant for Sudbury Public Schools Superintendent Search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a School Superintendent.

Not Advantageous: The Proposal provides fewer than three (3) project examples where the proposed Lead Consultant for Sudbury Public Schools Superintendent Search has organized, trained, and facilitated working groups as part of an executive search process, with one (1) of these examples leading to the hiring of a School Superintendent.

Unacceptable: The Proposal provides fewer than three (3) project examples where the proposed Lead Consultant for Sudbury Public Schools Superintendent Search has organized, trained, and facilitated working groups as part of an executive search process, none of which has led to the hiring of a School Superintendent.

Proposer's Implementation Plan and Schedule

Highly Advantageous: The Proposal includes a detailed description of examples of previously successful recruitment strategies and includes a clearly delineated timeline with specific milestones for Sudbury's Superintendent search.

Advantageous: The Proposal includes an outline of some candidate recruitment strategies and an implementation plan that includes some milestones for Sudbury's Superintendent search.

Not Advantageous: The Proposal lacks specific recruitment strategies or specific milestones for Sudbury's Superintendent search.

Unacceptable: The Proposer does not include any information about a proposed implementation plan and schedule.

Proposer's Recruitment Materials

Highly Advantageous: The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least five (5) different Superintendent searches with the proposal, at least one (1) of which involves a Superintendent search in Massachusetts.

Advantageous: The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least three (3) different Superintendent searches with the proposal, at least one (1) of which involves a Superintendent search.

Not Advantageous: The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from fewer than three (3) different Superintendent searches with the proposal, at least one (1) of which involves a Superintendent search.

Not Advantageous: The Proposer does not include samples of advertisements, brochures or other forms of candidate outreach.

Proposer's Networking Strategies

Highly Advantageous: The Proposal provides more than three (3) examples of how the Proposer's established networks of professional education contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including

women and minorities.

Advantageous: The Proposal provides three (3) examples of how the Proposer's established networks of professional education contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

Not Advantageous: The Proposal provides fewer than three (3) examples of how the Proposer's established networks of professional education contacts will be used in the search process and recruitment process to attract a broad range of highly qualified candidates, including women and minorities.

Unacceptable: The Proposal does not include specific examples of networks the Proposer will use in the search and recruitment process.

Proposer's Executive Search Tailored to District

Highly Advantageous: The Proposal provides more than three (3) examples of executive search and recruitment work showing how each planning model specifically met the needs of the particular entity with whom they were working, with at least one (1) of these examples leading to the hiring of a School Superintendent.

Advantageous: The Proposal provides three (3) examples of executive search and recruitment work showing how each planning model specifically met the needs of the particular entity with whom they were working, with at least one (1) of these examples leading to the hiring of a School Superintendent.

Not Advantageous: The Proposal provides fewer than three (3) examples of executive search and recruitment work showing how each planning model specifically met the needs of the particular entity with whom they were working, with at least one (1) of these examples leading to the hiring of a School Superintendent.

Unacceptable: The Proposal provides no specific examples of executive search and recruitment work related to the hiring of a School Superintendent or educational executive.

Proposer's Geographic Reach

Highly Advantageous: The Proposal describes a search geography extending beyond Massachusetts (e.g., New England or regional) and demonstrates, with supporting data, that the Proposer has placed Superintendents originating from outside Massachusetts within the past five (5) years.

Advantageous: The Proposal describes a regional (New England) search geography and demonstrates that the Proposer has placed at least one (1) Superintendent originating from outside Massachusetts within the past five (5) years.

Not Advantageous: The Proposal describes a search limited primarily to Massachusetts, with no data showing placements from outside the state.

Unacceptable: The Proposal does not describe the Proposer's search geography or provide supporting data.

References

Highly Advantageous: All five (5) references were satisfied with the Proposer's work and stated that all executive search tasks were completed within the time frame required.

Advantageous: All five (5) references were satisfied with the Proposer's work and stated that all executive search tasks were completed, but not within the time frame required.

Not Advantageous: Fewer than five (5) references were satisfied with the end results.

Unacceptable: The preponderance of references was dissatisfied with the end results.

All technical proposals will be given a cumulative ranking based on individual rankings of the

following weighted elements, using a score sheet included as Attachment B: Proposer's Experience, Proposer's capacity, Key Personnel, Proposer's Approach to Ensuring Community Involvement, Proposer's Implementation Plan and Schedule, Proposer's Recruitment Materials, Proposer's Networking Strategies, Proposer's Executive Search Tailored to Districts, Proposer's Geographic Reach, and References.

The Sudbury School Committee and/or their designees may invite all Proposers whose Technical Proposals have an overall evaluation rating of "Highly Advantageous" to be interviewed.

Interviews (if necessary) will be ranked as follows:

Highly Advantageous: The Lead Consultant for this project was present, clearly stated a plan of action, demonstrated excellent communication skills, presented other personnel with experience and skills who will be assigned for the duration of this project, and successfully responded to all questions.

Advantageous: The Lead Consultant for this project was present, outlined a plan of action, demonstrated excellent communication skills, presented other personnel with experience and skills who will be assigned for the duration of this project, and successfully responded to most of the questions.

Not Advantageous: The Lead Consultant for this project was present but did not present a clear plan of action, or was unable to communicate effectively, presented other personnel who did not have the experience and skills to work on this project and/or who would not be assigned for the duration of this project, or did not successfully respond to questions.

Unacceptable: The Lead Consultant for this project was not present at the interview or was unable to communicate effectively and did not successfully respond to questions.

At the conclusion of the interviews, a composite rating will be assigned to each Proposal. After a review of the composite ranking of the Technical Proposals and the interviews (if conducted), the Price Proposals will be opened and evaluated by the Sudbury School Committee Chairperson or designee.

CONTRACT AWARD

The contract will be awarded to that Proposer deemed by the School Committee and/or its designees to have submitted the most advantageous proposal taking into consideration all of the Technical Proposal criteria, and Proposers' interviews in addition to the Price Proposals. In accordance with the provisions of M.G.L. c. 30B, sec. 9., the Sudbury School Committee reserves the right to waive any informalities in any or all proposals or to reject and or all proposals, if it be in the public interest to do so.

TERM OF CONTRACT

It is anticipated that the work under this contract shall begin upon the signing of the contract, and shall be completed upon the implementation of a contract with the successful hire of a new Superintendent or upon the approval of an alternate plan in the event of a failed search, on or before June 30, 2027. For purposes of this provision, the search shall be deemed complete upon the Superintendent's execution of an employment contract with the School Committee; any onboarding or transition support described in the Proposer's Technical Proposal shall continue through the Superintendent's start date notwithstanding the completion of the search.

RFP issued August 19, 2026 at 40 Fairbank Road, Sudbury, MA

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**nothing follows on this page**

**Attachment A**  
**Price Proposal**

**(To be submitted as separate PDF file or in a separate sealed envelope from the Technical Proposal)**

The price proposal (one original copy) must be submitted without “conditions or exceptions” and must be submitted under separate cover and in a sealed envelope.

The price proposal set forth in this proposal shall constitute full and complete compensation for the services to be provided by the Consultant/Firm. There shall be no reimbursement for out-of-pocket or other expenses incurred by the Consultant in connection with the performance of the services. Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the Proposer. Any exceptions may result in the rejection of the proposal.

**Price Proposal for Sudbury Public Schools Superintendent Search:**

\$\_\_\_\_\_ Total Fixed Fee Contract

Price Total Fixed Fee Contract Price in words:

**The Price Proposal must include a rate schedule for the Lead Consultant or other relevant personnel for possible services to be added outside the Scope of Work. Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the Consultant.**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_ Tel: \_\_\_\_\_

Address:

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email:

## Attachment B

### Technical Proposal Rating Sheet

Each element of the Technical Proposal must be rated using the following scale:

Highly Advantageous-3

Advantageous- 2

Not Advantageous-1

Unacceptable- 0

Name of Proposer \_\_\_\_\_

Name of Reviewer: \_\_\_\_\_

**Weighted percentages are notional; actual percentages will be determined by the Evaluation Committee before beginning proposal reviews.**

| Weighted Percentages | Technical Proposal Elements              | Rating |
|----------------------|------------------------------------------|--------|
| 20%                  | Experience                               |        |
| 5%                   | Capacity                                 |        |
| 15%                  | Key Personnel                            |        |
| 20%                  | Approach to Ensure Community Involvement |        |
| 5%                   | Implementation Plan and Schedule         |        |
| 5%                   | Recruitment Materials                    |        |
| 15%                  | Networking Strategies                    |        |
| 5%                   | Executive Search Tailored to District    |        |
| 5%                   | Geographic Reach                         |        |
| 5%                   | References                               |        |
| 100%                 | TOTAL                                    |        |

## **Attachment C**

### **CERTIFICATION OF GOOD FAITH & NON-COLLUSION**

The undersigned certifies under pains and penalties of perjury that this bid 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.

### **CERTIFICATE OF STATE TAX COMPLIANCE**

Pursuant to M.G.L. c.62C, §49A, the undersigned acting on behalf of the Contractor, certifies under the penalties of perjury that, to the best of the undersigned's knowledge and belief, the Contractor is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.\*

\*\* Signature of authorized individual submitting bid/proposal

Printed Name

date

Name of Business (if applicable)

\*\*\* Social Security or Federal Tax Identification Number

\* The provision in the Attestation relating to child support applies only when the Contractor is an individual.

\*\* Approval of a contract or other agreement will not be granted unless the applicant signs this certification clause.

\*\*\*Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of M.G.L. c.62C, §49A.



### **REFERENCES FORM**

**\*\*\* You may use your own reference form(s) if they provide the same information. \*\*\***

Proposer's Name: \_\_\_\_\_

Proposer must provide references for similar type projects performed within the past five years.

Attach additional pages if necessary.

Reference: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Fax: \_\_\_\_\_

Description and date of Project: \_\_\_\_\_

Reference: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Fax: \_\_\_\_\_

Description and date of Project: \_\_\_\_\_

Reference: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Fax: \_\_\_\_\_

Description and date of Project: \_\_\_\_\_

Reference: \_\_\_\_\_ Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Fax: \_\_\_\_\_

Description and date of Project: \_\_\_\_\_

**SIGNATURES**

**(IF AN INDIVIDUAL)**

Date \_\_\_\_\_, 2026

Signature of Proposer (SEAL) (Owner and Proprietor)

Business Name D/B/A \_\_\_\_\_

Business Address

-----  
**-- (IF A CO-PARTNERSHIP)**

Date \_\_\_\_\_, 2026

Firm Name \_\_\_\_\_

\_\_\_\_\_(SEAL)

By \_\_\_\_\_(SEAL)

Business Address

Names and Addresses \_\_\_\_\_

of all

Members of Firm

-----  
**-- (IF A CORPORATION)**

Date \_\_\_\_\_, 2026

Corporate Name

By  
President or Authorized Agent\*

Business Address \_\_\_\_\_

\*Statement of authorization, duly signed by proper authority, to be attached hereto.

RFP issued August 19, 2026 at 40 Fairbank Road, Sudbury, MA

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nothing follows



SUPERINTENDENT SEARCH TECHNICAL PROPOSAL

September 4, 2026

HYA | HAZARD
YOUNG
ATTEA
ASSOCIATES

Hazard, Young, Attea & Associates
909 W. Euclid Ave #926, Arlington Heights, IL 60006
Tel 847.250.7261 | hya@hyasearch.com | hyasearch.com

TABLE OF CONTENTS

| | |
|--|---------|
| Table of Contents | Page 2 |
| Letter of Interest | Page 3 |
| Overview of HYA and
Organizational Chart | Page 5 |
| Project Team Members
and Resumes | Page 8 |
| Scope of Services and Work Plan | Page 16 |
| Implementation Plan and
Tentative Timeline | Page 22 |
| References and
List of Recent Contracts | Page 25 |
| Promotional Materials | Page 32 |
| Non-Collusion Form
and Tax Compliance Certification | Page 45 |



LETTER OF INTEREST

September 4, 2026

Karyn Jones, Chair
Sudbury Public Schools - School Committee
40 Fairbank Road
Sudbury, Massachusetts 01776
RE: Sudbury Public School's Superintendent Search

Dear Ms. Jones and Members of the Sudbury School Committee:

Thank you for the opportunity to present this overview of the services that Hazard, Young, Attea & Associates (HYA) can provide to the Sudbury Public Schools in your search for a new superintendent. Why is HYA exceptional amongst educational search firms and brings great value to the Sudbury search? We believe it is due to the following factors:

NATIONAL REACH – LOCAL KNOWLEDGE: HYA's extensive search experience connects us directly with the nation's top educational leaders. Our deep knowledge of their qualifications and personal networks allows us to recruit candidates who align closely with your District's leadership needs. We do not rely on ads or resumes—we actively recruit. HYA's success is about people: our 130+ Associates, their extensive contacts, and the school committees we assist. During the last 20 years, HYA conducted over 20 searches in Massachusetts. We build relationships with each new search, expanding our reach and our record of success.

EXPERT COUNSEL: We understand the political complexities of superintendent searches. With experience in highly charged environments, we stand beside you to defend the process and offer trusted guidance.

INTEGRATED TECHNOLOGY: Our process includes innovative interview practices and our analytical tools (Advanced Survey Reporting, Strategic Dashboard, Board Portal, and Recruitment Analytics) deliver a modern, evidence-based approach unmatched in the field.

DEEP, STRATEGIC COMMUNITY ENGAGEMENT: Community engagement is at the heart of our work. We engage a wide range of voices—students, parents, staff, civic leaders, and more—through a structured, research-based process that informs a Leadership Profile reflecting your community's values. Throughout, we serve as your ambassadors.

HYA has numerous options for our clients to customize their search to the District's and Committee's specific needs and wishes. We look forward to hearing from you to discuss your search and how we can assist you in this process.

Sincerely,

Caryn Shaw

Caryn Shaw, Co-Lead Associate



Dr. George S. Perry, Jr., Co-Lead Associate



OVERVIEW OF HYA AND ORGANIZATIONAL CHART

INTRODUCTION

Thank you to the Sudbury Public Schools School Committee for the opportunity to present this proposal from HYA to conduct a national search for talented and highly qualified candidates for the position of Superintendent of Schools for the Sudbury Public Schools (hereinafter referred to as District).

FIRM INFORMATION

HYA is the leading superintendent search firm in the nation and has more experience in identifying quality education executives than any other firm in the industry. Providing unparalleled professionalism and a personalized experience working with each School Committee and school district, it's no accident that our firm has assisted School Committees/Boards with successful selections in more than 2,000 searches, with student enrollment ranging from less than 500 students to upwards of 640,000. The large quantity of searches HYA conducts per year puts us at a competitive advantage. The search volume places the firm and our Associates in more frequent contact with potential candidates, many of whom may not be actively seeking employment and are then known to our Associates and can thus be recruited when or if an appropriate position arises.

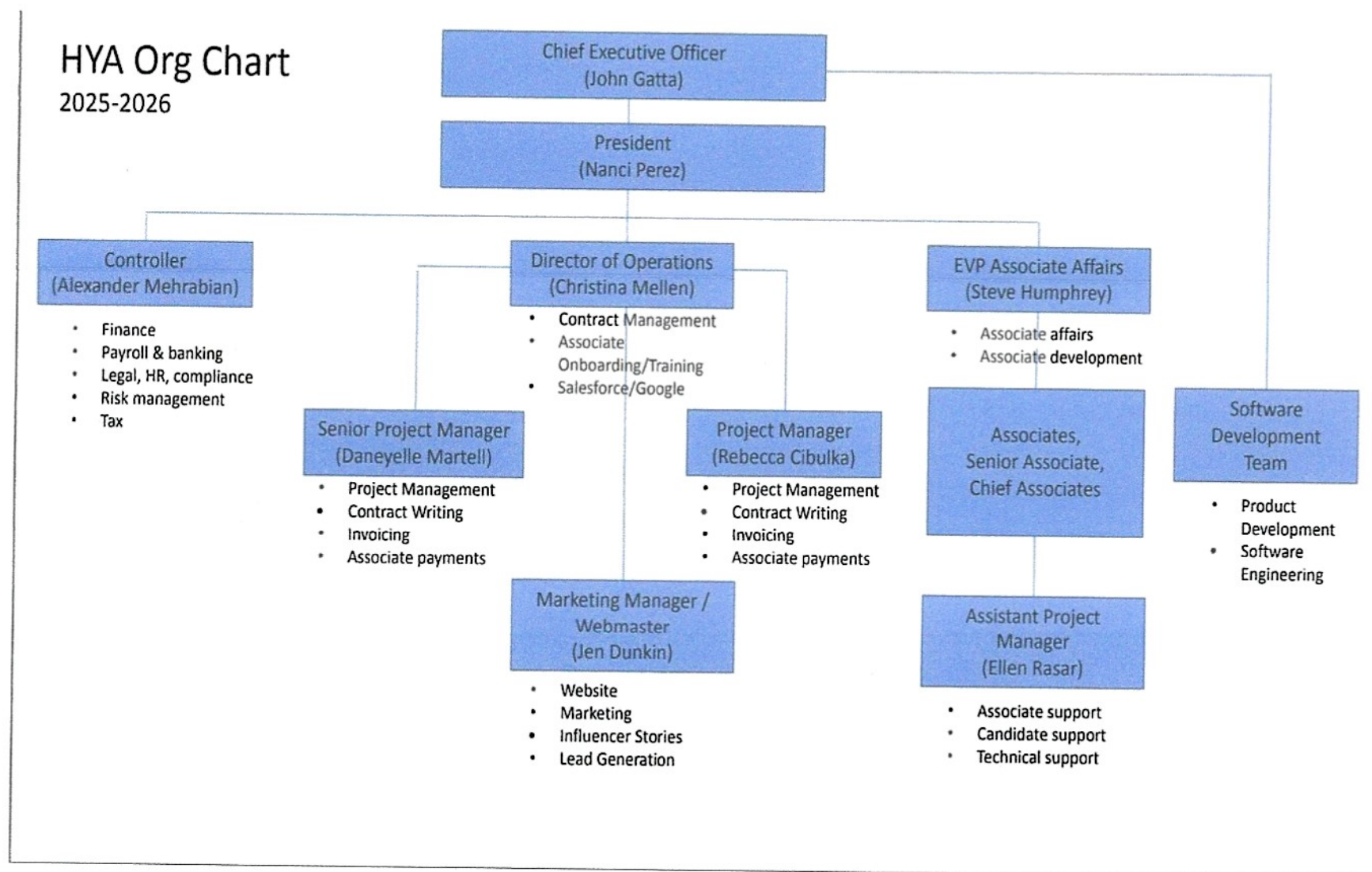
HYA began working with rural, urban and suburban School Committees/Boards more than 35 years ago in an effort to assist them in recruiting highly qualified candidates and finding a leader who is the right fit for their school system. HYA's continued success is about people: our Associates, their extensive contacts, and the School Committees/Boards assisted. We pride ourselves on working closely with the District and School Committee and are always accessible to answer questions, address any concerns, and provide highly personalized service during this time. We actively listen, identifying your District's individual strengths, opportunities for growth, and actively recruit individuals who are aligned to your particular leadership profile. HYA builds relationships with each new search, expanding our reach and record of success. Our references and reputation attest to this.

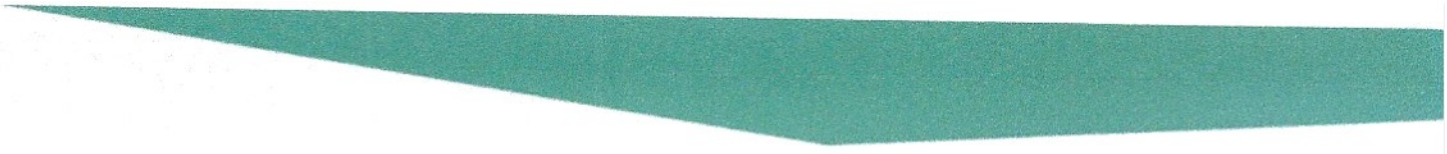
In addition to our personalized approach, with a focus on communication and support for the School Committee/Board throughout the entire process, your local HYA search team is expert at recruiting. They are part of a network of 130+ Associates from throughout the United States that assist with our firm's mission to provide aggressive, thorough, and quality assistance to School Committees/Boards in need of identifying and recruiting highly qualified executives for superintendencies and other administrative positions.

Since its founding in 1987, HYA has remained committed to engaging a diverse cadre of associates and advancing inclusive leadership recruitment. Today, 41% of HYA associates are people of color,

half are women, and the firm is woman-owned. This commitment to diversity informs every aspect of our executive search process.

Many HYA Associates have served and/or currently serve as members of and Board of Directors of ALAS (Association of Latino Administrators and Superintendents), NABSE (National Alliance of Black School Educators) and other associations across the country. HYA is proud of the diversity of candidates hired with its assistance, including individuals of varied gender, race, ethnicity, culture, and religious background. At HYA we are committed to identifying, supporting, and placing school and district leaders of color and gender who have long been historically underrepresented in these posts.



A green geometric shape, resembling a stylized mountain peak or a folded corner, is located at the top of the page.

THE SEARCH TEAM

THE SEARCH TEAM

Every HYA search has executive oversight by the HYA President and a Project Manager to ensure no detail is overlooked. HYA has professionally staffed offices, a technological infrastructure, and a staff of full-time employees that is a valuable resource to school districts.

HYA assigns an individual management team to each executive search that it conducts. The HYA team of Perry and Shaw not only have extensive successful search history, experience and knowledge, they have a strong network of HYA Associates and colleagues across the Northeast and the country. George and Caryn are assigned to the district for the duration of the contract.

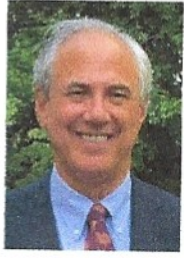
| HYA Associate | Cell Phone | Email |
|--------------------------|----------------|---------------------------|
| Caryn H. Shaw | (908) 229-7362 | carynshaw@hyasearch.com |
| Dr. George S. Perry, Jr. | (781) 760-1974 | georgeperry@hyasearch.com |

Daneyelle Martell serves as project manager and can be reached at 847-250-7493 and daneyellemartell@hyasearch.com



Ms. Caryn Shaw – Co-Lead Associate, HYA. Caryn is a strategic planning and governance leader with extensive experience supporting school districts and nonprofit organizations through executive search, board governance, and organizational planning. As a Senior Associate with Hazard, Young, Attea & Associates, she partners with boards of education on superintendent and executive-level searches, strategic planning initiatives, and stakeholder engagement processes. Through her consulting work, Caryn has helped organizations develop long-term strategic priorities, strengthen leadership practices, and build meaningful community partnerships that drive sustainable impact.

An accomplished board leader, Caryn currently serves as Board Chair of BookSmiles and previously served as President, Vice President, and Board Member of the Moorestown Board of Education. In these roles, she has provided strategic oversight, guided organizational growth, overseen long-range planning efforts, and supported sound fiscal and governance practices. Caryn is passionate about helping organizations navigate complex challenges, align stakeholders around a shared vision, and create systems that support strong leadership and lasting success.



Dr. George Perry - Co-Lead Associate, HYA. George has 40 years of experience in education at the local, state and national levels. George directed experienced, highly successful consultant teams in building instructional leadership capacity at the district and school levels in over 30 districts across the country. He and his colleagues assisted school boards, superintendents, and district and school leaders transform central offices to support schools; strengthen instructional leadership capacity by fostering vertical coherence from the classroom to the boardroom; redesign districtwide systems of support for students with disabilities and family engagement; strengthen principal instructional leadership; accelerate middle and high school level academic achievement; and develop prototype curricula. George and his colleagues guided over 100 schools to raise and sustain student achievement by improving instruction and shared leadership, building on school strengths, and using data and research-based strategies.

As a trusted confidential partner for 20 years, George prepares and advises committee/board members as they engage in superintendent search processes, assists school committees/boards develop and refine their consensus-driven vision and strategic plans, facilitates semi-annual board/superintendent retreats, and supports superintendents in transition and strategic planning.

George and his colleagues had the opportunity to partner with districts of all sizes in 17 states. He has shared lessons-learned with partner districts in the bestselling *Equity Warriors: Creating Schools That Students Deserve* (Corwin, 2022). Based in Scituate, Massachusetts, he continues to advise school committees/boards and district leaders and is an adjunct professor specializing in education leadership and change management at Northeastern University.

CARYN H. SHAW

Moorestown, NJ | 908-229-7362

PROFESSIONAL PROFILE

Senior education consultant and board leader with experience advising school districts and boards of education on **superintendent and executive searches, strategic planning, board governance, and stakeholder engagement**. Former Board of Education President with firsthand understanding of district leadership, governance, and community relations.

PROFESSIONAL EXPERIENCE

CHS Consulting Services | *Principal* | 2022–Present

- Advise school districts and nonprofit organizations on strategic planning, governance, stakeholder engagement, communications, and project implementation.

Hazard, Young, Attea & Associates | *Senior Associate* | 2022–Present

- Partner with boards of education on superintendent and executive searches, strategic planning, community engagement, and governance.
- Facilitate stakeholder engagement, leadership profile development, candidate evaluation, and board decision-making.

ConnectEd Workforce | *Consultant* | 2022–Present

- Support state- and nonprofit-funded initiatives focused on educator workforce development, professional learning, and access to high-quality teaching and learning.

Jewish Federation of Southern New Jersey | *Grants Coordinator, PT* | 2023–Present

- Co-lead system-wide strategic planning and stakeholder engagement and manage grant administration, reporting, and stewardship.

BookSmiles | *Board Chair / Vice Chair* | 2023–Present

- Provide strategic leadership and governance for a regional literacy nonprofit, partnering with executive leadership on growth, fundraising, and organizational priorities.

BOARD & COMMUNITY LEADERSHIP

Moorestown Board of Education | *President / Vice President / Board Member* | 2015–2018; 2019–2022

- Provided governance and strategic oversight for a public school district with an approximately \$80M annual budget.
- Led and supported work in strategic planning, curriculum, finance and operations, communications, facilities, and community engagement.

Additional Leadership: Development Chair/Trustee, Moorestown Education Foundation | President, Moorestown Jewish Association | Education Grant Committee, Impact100 South Jersey

EARLIER EXPERIENCE

Marketing Consultant, The NPD Group | *Senior Project Director*

EDUCATION

Hofstra University — M.B.A., Marketing & Management | **SUNY Binghamton** — B.A., Writing & Literature

George S. Perry, Jr., Ph.D.

Scituate, Massachusetts 02066
c: (781) 760-1974 e: georgeperry@hyasearch.com

Positions

Lead HYA Associate, Hazard, Young, Attea & Associates

February 2025 - Present

Conduct superintendent searches, strategic planning, leadership coaching, and Board/Committee governance workshops.

George S. Perry, Jr. LLC

October 2021 - Present

Advises education leaders on system change strategies to initiate, advance and sustain their equity agenda using lessons learned from three decades with partner school districts across the United States. Author of *Equity Warriors: Creating Schools That Students Deserve* (Corwin, 2022).

Director, School Leadership and Organizational Alignment, Office of the Chancellor, New York City Department of Education

November 2018 - December 2021

Leads the assessment, alignment and implementation of city-wide leadership development of teacher, school and district leaders to achieve the Chancellor's equity agenda.

- Design of the NYC DOE theory of action and organizational realignment to articulate leadership expectations for every role from teacher to district leader, and a career pipeline.
- Plan and oversee organizational realignment and facilitate shifts to effectively achieve the equity vision.
- Plan and oversee the design and execution of values-enhanced processes to attract, select, support and retain equity-focused, highly effective leaders at all levels.

The NYC DOE is the nation's largest school district with 1.1 million students, 1,800 schools located in five boroughs, and a \$38B annual budget.

Executive Director, Perry and Associates, Inc., Scituate, Massachusetts

January 2000 - October 2018

Experience working with PreK-12 public school districts and schools as the Executive Director of Perry and Associates, Inc. a national consulting firm that acts on its commitment to social justice and equity by assisting district and school leaders improve the academic achievement of *all* students.

- Redesign New York City Department of Education's (1) System-wide Reform Initiative to Raise Achievement of Students with Disabilities *and* (2) System-wide Reorganization to Improve Family and Community Engagement;
- Transform the Montgomery County (MD) and Stamford (CT) Central Offices to Improve Support to Schools;
- Strengthen instructional leadership capacity in San Diego (CA) through a systemic approach to learning from the classroom to the board room;
- Strengthen Principal Leadership in Boston, Corpus Christi (TX), Long Beach (CA) and San Diego;

- Accelerate Middle-Grades and High School Reform in Corpus Christi (TX), Jefferson County (KY), and Long Beach; and
- Use Prototype Curricula in Flint (MI) as a Lever for Change.
- Guide, with associates, over 75 low-performing schools in Corpus Christi, Flint, Long Beach, Los Angeles, and San Diego raise and sustain student achievement by improving instruction, building on strengths and using data and research-based strategies.
- Initiate and sustain district and school partnerships which have been successful in raising student achievement, closing achievement gaps, and preparing students for college and careers. Among the past and current districts, three have won the prestigious Broad Prize for Urban Education, awarded annually for raising student achievement and closing achievement gaps.

Senior Consultant, Panasonic Foundation, Inc., Newark, New Jersey

October 1994 – June 2017

Assists district leaders on their journey toward advancing equity as a “critical friend” and coach. Leaders build their capacity to think and plan strategically and systemically, identify barriers to improvement, and address significant challenges through creating conditions for system-wide change and enhancing leadership skills and actions. Lead liaison and/or team member in partnerships including Atlanta, Boston, Hayward (CA), Newark, Norfolk, Portland (OR), Prince George’s County (MD), Providence, San Diego, Santa Fe, and Stamford.

Senior Education Policy Advisor to Mayor Martin J. Walsh, Boston, Massachusetts

January 2014 – May 2014

Advise Mayor Walsh on education matters during the transition and early months of office, including the superintendent search. Design implementation plans for campaign policy issues of Universal Pre-Kindergarten, School Facilities Master Plan, High School Reform and Extended Learning Time. Engage as liaison between the Mayor, the Boston School Committee, Superintendent, Boston Teachers Union and community partners.

Liaison, Empowerment Zones and Enterprise Communities, Price Waterhouse L.L.B., Chicago, Illinois.

December 1995 – May 1996

Liaison between the President’s Community Empowerment Board and the Midwest. Assist Chicago, East St. Louis and Springfield, Illinois and St. Louis, Missouri create strategic plans for improving conditions in their most distressed neighborhoods and access assistance from federal agencies to expand opportunities for education, employment and housing.

Assistant Director, Special Committee on Youth Education for Citizenship, American Bar Association, Chicago, Illinois

November 1990 – December 1995

Enhance standards-based instruction in urban elementary and secondary schools by: (1) conducting teacher training in standards-based civics curriculum and instructional strategies; (2) building national coalitions to promote educational change through networking with major national education, government, minority, justice and legal organizations and their affiliates; (3) directing a multi-year collaborative project with Metropolitan Nashville Public Schools to design and implement K-12 curriculum, instruction and other programs in a restructuring school district; (4) co-designing a k-8 standards-based curriculum project in Elgin (IL) and Chicago public schools; and (5) strengthening the ability of state and local organizations in Louisiana, South Dakota and West Virginia to offer education programs. Organize national

leadership development seminars and conferences. Conduct research, publish articles in professional journals, and write technical assistance and informational materials. Provide technical assistance to individuals and organizations at the national, state and local levels in strategic planning and organizational and curriculum development. Manage grant-funded projects and staff.

Program Director, Bureau of Student Development and Health, Massachusetts Department of Education, Quincy, Massachusetts September 1987 - October 1990

Design and manage various school-based programs for at-risk youth (grades kindergarten through twelve) including dropout prevention, remediation, comprehensive health education, guidance and counseling, AIDS/HIV prevention, substance abuse prevention and student leadership programs totaling \$10 million annually. Direct board policy on at-risk youth. Lead the development of and implement strategies aimed at improving the effectiveness of local schools, particularly in the areas of school restructuring and school climate. Develop several programs which strengthened curriculum including leading a team of teachers in writing a state curriculum framework. Lead teams to design innovative programs. Negotiate interagency agreements. Conduct training for administrators and teachers. Manage staff.

Acting Director, Bureau of Student, Community and Adult Services, Massachusetts Department of Education January 1987 - August 1987

Direct operations of four distinct program units and assist in shaping the future directions of these units during reorganization. Manage employees in seven sites. Lead the development and implementation of a \$1.4 million comprehensive health education program.

Director for Student Services, Massachusetts Department of Education

May 1982 - December 1986

Design, direct, implement and evaluate a \$2.5 million dropout prevention program. Hire, train and supervise employees. Publish two books, several booklets, a promotional videotape and several articles for professional journals on topics relating to citizenship education, history, community involvement and school change.

Educational Specialist of Student Services in the Greater Boston Region, and Supervisor in Education, Massachusetts Department of Education

July 1977 - April 1982

Design and participate in several monitoring and technical assistance team visits to evaluate and support schools' compliance with state regulations. Provide leadership and analytical training for secondary school administrators, teachers, and students. Advise students members of the state and regional Massachusetts Student Advisory Council.

Additional Positions

Education Policy Advisor during the 2013 campaigns and on the transition teams of Mayor Marty Walsh of Boston and Mayor Bill de Blasio of New York City.

Adjunct Faculty, doctoral/masters programs:

Northeastern University, College of Professional Studies, Part-time Lecturer, Leading and Managing Change, Designing Educational Systems for Justice and Equity, July 2022-present; American University, School of Education, Adjunct Professorial Lecturer, Education and Public Policy, August 2018-2021

University of Illinois at Chicago, College of Education, Foundations of School Administration, 1995; and
Nova Southeastern University, Programs in Child and Youth Studies, Curriculum Development and Systemic Change, Leadership 1995 – 1997

Senior Consultant, National Staff Development Council (now Learning Forward) January 2003-January 2010

Publications

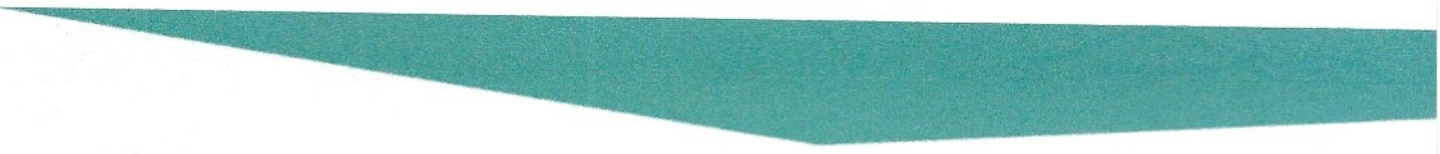
Publication list provided upon request.

Licensure and Certifications

| | |
|---------------|---|
| Massachusetts | Assistant Superintendent/Superintendent |
| Illinois | Administrative Type 75 |

Education

| | |
|---|------|
| University of Illinois at Chicago | 1995 |
| Ph.D. in Public Policy Analysis, Elementary and Secondary Education | |
| Harvard University | 1981 |
| Ed. M. in Administration | |
| Babson College | 1980 |
| M.B.A | |
| Northeastern University | 1977 |
| B.S. with honors | |



PROPOSED SCOPE OF SERVICES AND WORK PLAN

PROPOSED SCOPE OF SERVICES AND WORK PLAN



Engage Phase

HYA takes great pride in its commitment to community engagement and thoroughness of the processes used to gather input. The firm has a strong reputation for deep and meaningful engagement through its stakeholder forums, community interest group meetings and individual interviews that are a critical component of every HYA search. HYA also employs a research-based survey tool that is customizable and available in world languages. There is a lot of science involved in crafting an effective and reliable survey; the resulting survey report is presented with disaggregated data by stakeholder group and identifies the goals, needs and priorities of the school system along with the desired characteristics of its next leader. The Community and Leadership Profile Report is sophisticated and immediately publishable for your community.

HYA has a history of successful virtual/video-based engagement. HYA has extensive experience and expertise conducting video interviews, focus groups, forums, meetings, candidate presentations, meet-and-greets, and community Q&A sessions. In addition, the firm has reported and presented to school committees at public meetings and in closed sessions using the whole array of video platforms.

The Engage Phase is a disciplined and inclusive approach that seeks first to understand what students, staff, parents, School Committee and community members need and desire from their school district and Superintendent. HYA engages both internal and external stakeholders using virtual or face-to-face interviews, focus groups, forums, and surveys. The goal is to gather information from all stakeholders to identify the strengths of the district/community and current and foreseeable district/community challenges within a research-based framework to match the right leader with your school district.

Depending on the School Committee's selections for the Engage Phase, some of the most important deliverables include the following:

- Summary of the planning meeting with the School Committee that details the timeline, steps of the search process and decisions made by the Committee;
- HYA's Community and Leadership Profile Survey and Survey Report, as selected and paid for by the Committee;
- Findings from interviews, focus groups, and/or town hall meetings. Up to 24 one-hour sessions are provided. Additional sessions can be added per the daily rate.

- *Leadership Profile Report* and desired characteristics based on the data from the survey, interviews, focus groups, meetings with the School Committee and other material made available to the Associates.



Recruit Phase

HYA uses a myriad of recruiting techniques to ensure all potential candidates are reached. Without spending a dollar on advertising, HYA clients know that they are getting immediate exposure through the HYA Active Searches page with over 25,000 page views per month. In addition, HYA can provide analytics on your job posting, including how many views your job has received during a specific period of time, the average amount of time your posting was viewed, etc. No other firm has the infrastructure to provide this data to their clients.

HYA offers optional national and regional advertising packages that have been designed to maximize exposure for your vacancy. Given the volume of searches HYA conducts each year and our preferred pricing, our national package options provide our clients rates below what they could purchase in the marketplace.

In addition to national and regional advertising, HYA utilizes the firm's extensive national network of Associates. HYA Associates throughout the country are aware of outstanding superintendents and aspiring superintendents in their state and region and maintain close professional relationships with many educators and school district leaders who might be interested in making a job change or career move. HYA Associates have ongoing relationships with state and national superintendent organizations including AASA (The School Superintendent's Organization), ALAS (Association of Latino Administrators and Superintendents) and NABSE (National Alliance of Black School Educators).

Associates are kept informed of the searches the firm is conducting and we seek recommendations from them regarding candidates who fit the profile being sought for that district. The proof of our recruiting network and efforts is the fact that approximately two thirds of the candidates ultimately selected by School Committees/Boards with whom we work were recruited for the position rather than applied or self-nominated.

Depending on the School Committee's selections for the Recruit Phase, the deliverables include:

- Prepare and place advertisements as selected and paid for by the School Committee;
- Recruit and contact candidates utilizing national networks;

- Correspond with candidates regarding the search process, timeline, *Leadership Profile Report* and desired characteristics;
- Interview candidates;
- Conduct reference checks;
- Identify best-qualified candidates;
- Prepare application materials of selected slate of candidates for School Committee consideration.

Reference checking is one of the most important tasks in the search process. We begin with the informal references of referrals for potential candidates. Once an individual moves to the level of a potential candidate through the application process or through recommendations and recruitment efforts, we begin our vetting process. This includes contacting the listed references on the application or provided by the candidate. While this step is necessary it is not sufficient as most candidates will provide references that will provide only highly favorable comments. We continue the vetting process by conducting comprehensive internet searches to review any public information regarding the candidates. HYA Associates conduct confidential reference calls to obtain deep insight on any candidate that would be recommended to the School Committee for consideration. Given our network of Associates and many professional relationships, it is likely that we know someone who either knows the candidate directly or knows someone who knows the candidate. These references often provide confidential, hard-to-obtain information about the candidate that is invaluable in determining whether to recommend the candidate to the School Committee.



Select Phase

When the Associates present a select slate of candidates to the School Committee, the number of slated candidates is determined by the School Committee during the initial planning meeting. HYA believes that the Associates are responsible for supporting the School Committee in all phases of the search. This is particularly true during the interview process with the semi-finalists and finalists because the School Committee should be focused on assessing the candidates, not managing logistics. The Associates are available throughout the interview process and will facilitate a debriefing session after the interviews to discuss what the School Committee learned about the candidates. It is the School Committee's decision and sole discretion to hire or not hire a particular candidate and the School Committee takes responsibility for that decision.

Some of the specific deliverables during this phase include:

- Conduct the Interview Workshop and provide materials and protocols to ensure informative effective committee interviews;
- Present a slate of candidates, the number of candidates to be determined by the School Committee with a recommendation from HYA;
- Schedule interviews for the School Committee with selected semi-finalists and finalists;
- Facilitate School Committee discussion to narrow candidate pool after each round of interviews;
- Coordinate and provide investigative background check(s) of candidates, provided by an independent third-party firm, as selected and paid for by the School Committee;
- Communicate with all unsuccessful candidates at the close of the search and the appointment of the new superintendent;
- Assist the School Committee in announcing the appointment of the new superintendent.

In preparation for the Interview Workshop the Associates will solicit questions, hypothetical situations and/or topics of interest, identified by the School Committee as desirable topics of discussion for the Committee's initial round of interviews with the candidates. The feedback is used to develop an interview "script", which will be reviewed and revised during the Interview Workshop and later used by the School Committee for the first round of interviews. It should be noted that second round interviews are generally unscripted and designed to follow-up on topics and questions identified during the first round interviews. The Interview Workshop that takes place prior to the slate presentation, or in a separate advance session, is designed to prepare the School Committee for candidate interviews. It will include written guidelines and protocols to ensure informative and comprehensive interviews. The workshop is approximately one to two hours in length and will also cover the steps in the final stages of the search.

The Associates will facilitate each decision-making session of the School Committee, if desired. Such involvement permits more active engagement by all School Committee members in both the general search process and the specific dialogue regarding the candidate pool. In facilitating the decision-making process, HYA assists the School Committee in assessing the abilities of the respective candidates in relation to the criteria identified by the Committee. HYA does not provide counsel relative to the School Committee's process for interviewing candidates. The School Committee will seek the advice from its attorney regarding the Committee's process for interviewing candidates to comply with open meeting laws in their state.

An additional step is recommended towards the end of the Select Phase, before any public announcement: executive due diligence. HYA highly recommends executive due diligence on the finalist(s). Executive due diligence involves an investigative background check(s) that may be conducted on the few candidates that the School Committee brings back for second

interviews or the preferred candidate. The investigative background check(s) is conducted by an independent third-party entity and includes a review of criminal and civil court records, driving records, college degrees and university accreditations. The comprehensive package includes a news and social media review.



Transition Phase

The *Transition Phase* provides transition support to ensure a successful transition. From placing over 2,000 leaders, HYA knows how critical the transition phase is for success and longevity, setting the tone for trust, stability, and momentum. HYA Search Clients receive complementary enrollment in the HYA Transition Academy for their selected new leader. This six-month program will produce the following four essential deliverables to be presented to the School Committee and shared with constituents:

- a 100-day plan to document specific actions the Superintendent will take during the transition period,
- Key Performance Indicators (KPIs) to measure progress, align communication and define school quality,
- an agreed upon evaluation process and instrument, and
- an assessment of the current strategic plan.

At the conclusion of the Transition Academy, HYA offers the following optional services to be considered by the School Committee and if desired, paid for by the Committee. Optional service options are:

- School Committee Governance Training
- Superintendent Evaluation Facilitation
- Executive Coaching
- Strategic Dashboard for tracking progress and communicating success



IMPLEMENTATION PLAN AND TENTATIVE TIMELINE

HYA Signature Search Process

BOARD RESPONSIBILITIES

ASSOCIATE RESPONSIBILITIES

ENGAGE PHASE 3-4 WEEKS

Execute Contract

Planning Meeting with the Board

- Select Survey Options; Decisions Regarding Community Engagement
- Determine Ad Content; Decisions Regarding Advertising
- Define Selection Criteria; Decisions Regarding Executive Due Diligence

- Administer Community Survey
- Interview Board, Staff, & Community Representatives
- Facilitate Community Forums & Focus Groups

- Develop Leadership Profile & Desired Characteristics
- Prepare Ad Content

RECRUIT PHASE 6-8 WEEKS

- Approve Ad Content
- Approve Leadership Profile Report & Desired Characteristics

Publish Vacancy

Decide Interview Format(s) and Date(s)

- Recruit Candidates Utilizing State and National Networks
- Query HYA's Candidate Profile System
- Receive and Process Application Materials
- Correspond with Candidates
- Screen Candidates & Conduct Confidential Reference Checks
- Identify Best-Qualified Candidates
- Prepare Application Materials to be Shared with the Board

SELECT PHASE 3-4 WEEKS

- Conduct Initial Interviews
- Narrow Slate (Semifinalists)
- Hold Follow-up Interviews with Finalists
- Select Preferred Candidate

- Conduct Board Seminar Re: Interview Protocols
- Present Slate of Semifinalists to Board

Facilitate Board Discussions to Narrow Slate After Each Round of Interviews

Negotiate Contract

- Executive Due Diligence
- Assist with Contract Preparation

TRANSITION PHASE VARIES

Announce Appointment

Email Letters of Regret to Non-slated Applicants

Transition Planning

Associate/Superintendent/Board Leadership Transition Meeting

Superintendent Assumes Position

- Included Transitional Services
- Transition Academy
 - Cabinet Postings

TENTATIVE TIMELINE

This proposed timeline is subject to the appointment date of HYA as the District's search firm and based on the successor superintendent starting **July 1, 2027**.

We are committed to helping the school committee conduct a successful search process, whatever it takes. Typically, the search process is completed within 12 weeks. This draft is meant for illustrative purposes only and to assist with the planning process. HYA will develop a specific timeline with the Sudbury School Committee at the Planning Meeting. Please note that meetings can be scheduled in person or virtually.

| | |
|--|--|
| Appointment of Search Firm | September 16, 2026 |
| Planning meeting with Committee | Late September, 2026 |
| Interviews and focus group meetings | October, 2026 |
| Online Survey and Initial Job Posting | October, 2026 |
| Leadership Profile Report to the Committee | November, 2026
School Committee Meeting |
| Slate presented to Committee | December, 2026 |
| Committee initial Interviews | December, 2026 |
| Committee Semi-finalists Interviews | January, 2027 |
| Committee Selects Preferred Candidate | January, 2027 |
| Background Checks (3rd Party)/Negotiations | January, 2027 |
| Target for Public Announcement and Appointment | January, 2027 |
| Superintendent assumes Responsibilities | July 1, 2027 |



REFERENCES AND LIST OF RECENT CONTRACTS

LIST OF RECENT CONTRACTS

During the last 20 years, HYA conducted over 20 searches for Massachusetts superintendents, including Cambridge, Concord, Duxbury, Franklin, Lexington and Somerville. HYA conducted over 150 superintendent searches during the last five years, including the 2022-23 search for the Newton (MA) Public Schools and the Holliston (MA) Public Schools search completed in January 2026. The Holliston search was competitive and generated much interest resulting in a slate of highly qualified and experienced candidates for the District and Committee to meet.

HYA's reputation for effectiveness and integrity is extremely important. The following references were chosen because the School Committee/Board worked with the HYA Associates being proposed for the search or because the district has a similar demographic profile to your district. In addition to the references listed below, an extensive list of national searches our firm has completed in the last five years is attached. Our references will attest that phone calls from School Committee members and the Superintendent are picked up or returned immediately, regardless of the time of day. Emails are returned in a matter of hours, and questions are answered in detail. Our team works for you and with you.

| District Name and State | Reference Name | Contact Information |
|---|---|--|
| Holliston Public Schools
Holliston, MA
Enrollment: 2,689
2025-2026 | Sarah Fitzgerald
Committee Chair | (617) 592-7336
fitzgeralds@hsc.holliston.k12.ma.us |
| Barrington Public Schools
Barrington, RI
Enrollment: 3,377
2025-2026 | Thomas Peck
School Committee | peckt@barringtonschools.org
(401) 245-5000 |
| Cherry Hill Schools,
Cherry Hill, NJ
Enrollment: 10,919
2023-2024 | Miriam Stern
Board President | (856) 816-7114
miriamstern@chclc.org |
| Vineland Public Schools
Vineland, NJ
Enrollment: 10,317
2025-2026 | Cedric Holmes
Board President | (856) 506-4859
cholmes@vineland.org |
| Newton Public Schools
Newton, MA
Enrollment: 12,000
2022-2023 | Tamika Olszewski
School Committee Member | (617) 475-0359
olszewskit@newton.k12.ma.us |

SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

2025-2026

| 0 - 2,500 students | 2,501 - 5,000 students | 5,001 - 7,500 students | 7,501 - 15,000 students | 15,001+ students |
|---|---|--|---|---|
| <p>Cary CCSD 26 (IL)
Deanna Darling, Board President
2,372 students
847-361-2220
deanna.darling@carv26.org</p> <p>Center Consolidated School District No. 26 (CO)
628 students
Carrie Zimmerman, Current Superintendent
719-480-1491
czimmerman@center.k12.co.us</p> <p>Chilton School District (WI)
Terry Criter, Board President
1,048 students
920-216-8466
criter@chiltonsdsd.org</p> <p>Estes Park School District R-3 (CO)
882 students
Stacy Ferree, Board President
970-646-5929
stacy.ferree@psdr3.k12.co.us</p> <p>Riverside Community School District (IA)
677 students
J.T. Oltman, Board President
402-672-7400
joltman@riverside.k12.ia.us</p> <p>Turtle Lake School District (WI)
450 students
Bill Muench, Board President
715-641-0297
wmuench@turtlelake.k12.wi.us</p> | <p>Yorkville J2 School (WI)
District
465 students
PK-8
Dave Callewaert
414-510-2485
dave.callewaert@yorkville.k12.wi.us</p> <p>Anacortes School District (WA)
PK-12
2,595 students
James Everett, Superintendent
jeverett@asd103.org
(360) 603-0296</p> <p>Barrington (RI)
3,294 students
PK-12
T. J. Peck, Board President
401-245-5000
peckt@barringtonschools.org</p> <p>Milton School District (WI)
3,241 students
PK-12
Annette Smith, Board President
608-346-3673
smitha@milton.k12.wi.us</p> <p>Sycamore CUSD 427 (IL)
3,700 students
PK-12
Alan Zantout
815-762-3819</p> | <p>Auburn-Washburn (KS)
6,008 students
PK-12
Jeremy Wiltz, Board President
913-706-2526
wiltzjer@usd437.net</p> <p>Quincy School District 172 (IL)
6,276 students
PK-12
Shelley Arns, Board President
217-257-4245
shelley.arns@qps.org</p> | <p>East Brunswick (NJ)
8,000 students
PK-12
Wilber Pan
773-793-8889
wpeb9@ebnet.org</p> <p>Sun Prairie Area School District (WI)
8,500 students
PK-12
Diana McFarland, Board President
608-215-4056
dmmcfar@sunprairieschools.org</p> <p>Vineland Public School District, NJ
10,317 students
PK-12
Cedric Holmes, Board President
cholmes@vineland.org
(856) 506-4859</p> | <p>Anoka-Hennepin School District (MN)
PK-12
38,354 students
Michelle Langenfeld, Board President
651-442-6482
michelle.langenfeld@ahschools.us</p> <p>Chandler USD (AZ)
PK-12
42,000 students
Patti Serrano, Board President
serrano.patti@cusd80.com
phone: 602-881-2821
Dr. Claudia Mendoza, CUSD Governing Board Member
mendoza.claudia@cusd80.com
phone: 602-770-9232</p> <p>Clark County (NV)
310,000 students
PK-12
Irene Bustamante
ibadams@nv.ccsd.net</p> <p>Seattle Public Schools (WA)
50,000 students
PK-12
Gina Topp, Board President
gktopp@seattleschools.org</p> <p>Sioux Falls (SD)
25,000 students, PK-12
Carly Reiter
605-310-9400
Carly.Reiter@k12.sd.us</p> |

SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

2024-2025

| 0 – 2,500 students | 2,501 – 5,000 students | 5,001 – 7,500 students | 7,501 – 15,000 students | 15,001+ students |
|---|---|---|--|---|
| <p>Benjamin School District, 25 (IL)
620 Students, K-8
Eric Rogers, Board President
815-690-8019
erogers@benjamin25.org</p> <p>Benton Harbor Area Schools (MI)
1,314 Students, K-12
Dashuna Robinson, Board President
trustee.robinson@bhas.org</p> <p>Bickleton School District (WA)
104 Students, K-12
Mitchell Powers, Board President
509-820-0430
powersranches@gmail.com</p> <p>Bristol School District (WI)
782 Students, PK-8
Tina Effering, President
262-206-3992
elfering.tin@bristol.k12.wi.us</p> <p>Bruce School District (WI)
410 Students, PK-12
Roxie Kemnitz, President
715-403-3425
rkemnitz@bruce.k12.wi.us</p> <p>Cambridge, School District of (WI)
909 Students, K-12
Christopher Holt, Principal
920-382-6178
85chrisholt@gmail.com</p> <p>Dodgeland School District (WI)
754 Students, PK-12
Jeff Caine, Board Member
920-210-1852
caine@dodgeland.k12.wi.us</p> <p>ECHO Joint Agreement (IL)
1,200 Students
Dr. Dwayne Evans, Board President
708-475-1774
devans@hsdist157.org</p> <p>Minoqua J1 School District (WI)
565 Students, K-12
Christy Seidel, Board President
715-614-3821
cseidel@mhl.org</p> | <p>Waupaca School District (WI)
2,037 Students, K-12
Betty Manion, Board President
715-572-3362
bmanion@waupacaschools.org</p> <p>Whitewater Unified SD (WI)
2,000 Students, PK-12
Stephanie Hicks, Board President
920-723-7892
stephaniehicks@wwwusd.org</p> <p>Wisconsin Heights SD (WI)
780 Students, PK-12
Barb Statz, Board President
608-712-9383
bastatz@wisheights.k12.wi.us</p> <p>New Trier Township HSD 203 (IL)
4,000 Students, 9-12
Jean Hahn, Board President
312-246-0403
hahn@newtrier.k12.il.us
Paul Salley (Retired Superintendent)
847-784-6109
salley@newtrier.k12.il.us</p> <p>Reedsburg School District (WI)
2,650 Students, PK-12
Gary Woolever, Board President
608-963-5232
gwoolever@rsd.k12.wi.us</p> <p>Rye City School District (NY)
3,000 Students, K-12
Jane Anderson, Board President
anderson.jane@ryeschools.org</p> | <p>Dry Creek Unified School District (CA)
6,500 Students, K-8
Jon Fenske, Board President
jofenske@dciesd.us</p> <p>Liverpool School District (NY)
6,750 Students, K-12
Jecenia Bresett, Board President
jbresett@liverpool.k12.ny.us</p> <p>Mount Vernon City School District (NY)
6,800 Students, PK-12
Adriane Saunders, Trustee
asaunders@mtvernoncsd.org</p> <p>Old Bridge Township
8,000 Students, K-12
Jennifer D'antuono
jdantuono@obtps.org</p> <p>Oxford Community SD (MI)
7,000 Students, K-12
Dr. Erin Reis, President
734-755-3904
erin.reis@oxfordschools.org</p> <p>Walla Walla Public Schools (WA)
5,500 Students, K-12
Derek Sarley, Board President
dsarley@wwps.org</p> | <p>Cherry Hill Public Schools (NJ)
11,800 Students, K-12
Miriam Stern, Board President
856-816-7114
miriamstern@chcl.org</p> <p>Gresham-Barlow School District (OR)
11,500 Students, K-12
Kris Howatt, Board Chair
(503) 830-3608
howatt3@gresham.k12.or.us</p> <p>Santa Clara Unified School District (CA)
14,200 Students, K-12
Bonnie Lieberman, Board President
(650) 504-5199
blieberman@scusd.net</p> | <p>Atlanta Public Schools (GA)
50,300 Students, PK-12
Dr. Erika Mitchell, Board President
Erika.Mitchell@atlanta.k12.ga.us</p> <p>Blue Valley School District (KS)
22,400 Students, K-12
Gina Knapp, Board President
GKnapp@bluevalleyk12.org</p> <p>Jefferson County School District (KY)
95,000 Students, PK-12
Dr. Corrie Shull, Board Chair
corrie.shull@jefferson.kyschools.us</p> <p>Mesa Public Schools (AZ)
58,343 Students, K-12
Marcie Hutchinson, Gov. Board President
602-363-6429
mhutchinson@mpsaz.org</p> <p>Milwaukee Public Schools (WI)
67,500 Students, K-12
Tina Owen-Moore, Director
414-531-5957
owentm@milwaukee.k12.wi.us</p> <p>Montgomery Public Schools (AL)
26,435 Students, K-12
Arica Smith
Arica.smith@mps.k12.al.us</p> <p>Rialto Unified School District (CA)
24,000 students K-12
Stephanie Lewis Board President
slewis@rialtousd.org</p> <p>Rochester City School District (NY)
23,000 Students, K-12
Camille Simmons, Board President
Camille.Simmons@rcsdk12.org</p> <p>Sioux Falls SD (SD)
25,123 Students, K-12
Carly Reiter, President
605-310-9400
Carly.Reiter@k12.sd.us</p> |

SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

2023-2024

| 0 – 2,500 students | 2,501 – 5,000 students | 2,501 – 5,000 students | 5,001 – 7,500 students | 7,501 – 15,001+ students |
|---|---|--|--|---|
| <p>Cedar Grove Belgium Area Schools (WI)
910 students, PK-12
Chad Hoopman, Board President
414-336-5571
choopman@cgbrockets.com</p> <p>Clarke County Public Schools (VA)
1,900 students, PK-12
Monica Singh-Smith, Board Chair
singhsmithm@clarke.k12.va.us</p> <p>Coupeville School District (WA)
1,055 students, PK-12
Morgan White, Board President
mwhite@coupeville.k12.wa.us
360-632-2429</p> <p>Elgin Math & Science Academy (IL)
361 students, K-6
Ron Manderschied
312.636-7471</p> <p>Irvington Union Free School District
1,700 students, KG-12
Brian Friedman (Pres.)
brian.friedman@irvingtonschools.org
917-439-8746</p> <p>Mosinee School District (WI)
2,000 students, PK-12
Diane Gorman, Board President
dgorman@mosineeschools.org
715-570-1176</p> | <p>Ames Community School District (IA)
4,600 students, PK-12
Kelly Winfrey, Board President
785-979-0200</p> <p>Barrington Public Schools (RI)
3,400 students, PK-12
Patrick McCrann, School Committee Chair
mccrannp@barringtonschools.org</p> <p>Katonah-Lewisboro Union Free School District (NY)
2,800 students, PK-12
Julia Hadlock, Board President
jhadlock@klschools.org
914-393-5551</p> <p>Monona Grove School District (WI)
3,500 students, PK-12
Elizabeth Cook, Board President
586-215-7958
elizabeth.cook@mgschools.net</p> <p>North Monterey CUSD (CA)
4,400 students, KG-12
Martha Chavarria
chavarria_martha@nmcusd.org</p> <p>Oxford Area Community Schools (MI)
5,600 students, PK-12
Dr. Erin Reis, President
erin.reis@oxfordschools.org
734.755.3904</p> <p>Proviso Township HSD 209 (IL)
4,708 Students, 9-12
Amanda Grant, Board President
630-776-2066
agrant@pths209.org</p> | <p>Port Washington-Saukville School District (WI)
2,510 students, PK-12
Brenda Fritsch, Former President
262-483-4048
Karen Krainz, Vice President
karen.krainz@pwssd.k12.wi.us
708-601-0171</p> <p>South Sioux City Community Schools
3,800 students, PK-12
Chris Krueger
712-223-0698
chris.krueger@ssccards.org</p> | <p>Longview Public Schools (WA)
6,300 students, PK-12
Jennifer Leach
jenniferleach1890@gmail.com
360-430-0607</p> <p>Midland Public Schools (MI)
7,400 students, PK-12
Phillip Rausch, Board President
989-430-1612
phil.rausch@hscpsd.org</p> <p>South Orange-Maplewood School District (NJ)
6,800 students
Qawi Telesford, Board President
qtelesfo@somsd.k12.nj.us</p> <p>Tahoma School District (WA)
9,000 students
Michael Wiggins
mwiggins@tahomasd.us</p> <p>Township HSD 211 (IL) (2024)
Anna Klimkowicz
847-302-7223
aklimkowicz@northwestcompass.org</p> <p>Steve Rosenblum
srosenblum@d211.org</p> <p>Township High School District 214
12,000 students, 9-12
Alva Kreutzer
alva.kreutzer@d214.org</p> <p>Yorkville CUSD 115
6,900 students, PK - 12
Darren Crawford, Board President
630.927.1701
dcrawford@v115.org</p> | <p>Maryland State Department of Education
Joshua Micheal, PhD.
joshua.michael1@maryland.gov</p> <p>Phoenix Union HSD (AZ)
27,900 students, 9-12
Naketa Ross 480.435.5262
nross@phoenixunion.org</p> <p>Pueblo School District 60 (CO)
15,000 students
Sue Pannunzio, President
susan.pannunzio@pueblo60.org
719-821-0272</p> <p>Racine Unified SD (WI)
16,500 Students, K-12
Jane B. Barbican, Board President
262-732-4063
jane.barbican@rusd.org</p> <p>Virginia Beach City PS
65,456 students, PK-12
Kimberly A. Melnyk, Board Chair
757.619.3811
kimberly.melnik@vbcpboard.com</p> <p>Yonkers PS (NY)
24,500 Students, K-12
Rev. Steve Lopez, President
914-374-3117</p> |

SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

2022-2023

| 0 – 2,500 students | 2,501 – 5,000 students | 5,001 – 7,500 students | 7,501 – 15,000 students | 15,000+ students |
|---|---|---|---|---|
| <p>Colby SD (WI)
960 students, PK-12
Kristen Seifert 715.223.2301
kseifert@colby.k12.wi.us
Bill Tesmer 715.316.2569
wtmesmer@colby.k12.wi.us
Steve Kolden 715.223.2301
skolden@colby.k12.wi.us</p> <p>CCSD 89 (IL)
2,300 students, PK-8
Haydee Núñez
708.558.5009
hnunez@ccsd89.org</p> <p>Hayden SD (CO)
435 students, PK-12
Tammie Delaney
970.846.1404
tdelaney@haydenschools.org</p> <p>Hood Canal SD (WA)
315 students, PK-8
Edie Reclusado
206.612.2011
ereclusado@hoodcanalschool.org</p> <p>Hudson City (NY)
1,600 students, PK-12
Willette Jones,
ioneswm@hudsoncsd.org
Cheryl Rabinowitz
rabinowitzc@hudsoncsd.org</p> <p>Manson SD (WA)
600 students, PK-12
Robin Bloch
robin_b@frontier.com</p> | <p>North Salem CSD (NY)
1,200 students, K-12
Andrew Brown
brownboe@northsalemschools.org
Deb D.
daagostinoboe@northsalemschools.org</p> <p>Roseland SD (CA)
1,500 students, K-12
Patricia Kreuger
pkreuger@roselandsd.org</p> <p>Oak Park-River Forest SD
200 (IL)
3,400 students, 9-12
Greg Johnson 217.369.0827
gjohnson@oprfs.org</p> <p>PS of the Tarrytowns (NY)
2,400 students, PK-12
John Paine 914.407.2099
jpaine@tufsd.org</p> <p>SD of Menomonee Falls (WI)
4,000 students, PK-12
Nina Christensen
262.893.4396
nchristensen@sdmfschools.org</p> <p>South Sioux City CS (NE)
3,700 students, PK-12
Chris Kreuger 712.223.0698
chris.krueger@ssccards.org</p> | <p>Highland Park ISD (TX)
6,700 students, PK-12
Maryjane Bonfield
BonfieM@hpsisd.org</p> <p>Mamaroneck UFSD (NY)
5,400 students, PK-12
Ariana Cohen 917.626.0707
arcohen@mamkschools.org</p> <p>Neeah Joint School District (WI)
6,500 students, PK-12
Brian Epley, Board President
920-277-0949
brian.epley@neenah.k12.wi.us</p> <p>Ridgewood Public Schools (NJ)
5,600 Students
Sheila Brogan, Board President
201-519-5485
sbrogan@rpsnj.us</p> <p>Upper Arlington Schools (OH)
6,300 students, PK -12
Jenny McKenna
614.620.0400 (cell)
jcmckenna@uaschools.org</p> <p>Washington Township SD (NJ)
7,200 students, PK-12
Connie Baker 609.922.6760
connie_baker@verizon.net</p> | <p>Bellflower SD (CA)
10,200 students, K-12
Renita Armstrong
renitaarmstrong@busd.k12.ca.us</p> <p>Littleton SD (CO)
13,700 students, PL-12
Angela Christensen
720.341.2197
achristensenboe@lps.k12.co.us</p> <p>Newton Public Schools (MA)
12,000 students, PK-12
Tamika Olszewski,
443.255.2891
olszewskit@newton.k12.ma.us
Emily Prenner, 443.255.2891
prenner@newton.k12.ma.us</p> <p>Township HSD 214 (IL)
12,000 students, 9-12
Bill Dussling 630.248.0162
bill.dussling@td214.org</p> <p>Westerville City SD (OH)
14,500 students, PK-12
Tracy Davidson 614.797.5700
davidson@westerville.k12.oh.us</p> | <p>Aurora Public Schools (CO)
38,000 students, PK-12
Debra Gerkin 303.364.3794
degerkin@aurorak12.org</p> <p>Frederick County PS (MD)
45,000 students, PK-12
Brad Young
240.674.0516</p> <p>Prince George's County PS (MD)
130,000, PK-12
Erica Berry Wilson
240.620.9386
ebwilson1@co.pg.md.us</p> <p>Rochester Public SD (MN)
18,000 students PK-12
Jean Marvin 507.282.3427
jemarvin@rochesterschools.org</p> <p>Syracuse City SD (NY)
19,000 students, PK-12
Tamica Barnett
315.200.3979
tbarnett@scsd.us</p> <p>U-46 (IL)
36,000 students, PK-12
Susan Kerr
susankerr@u-46.org</p> |

SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

2021-2022

| 0 – 5,000 students | 5,001 – 25,000 students | 25,000+ students |
|--|--|---|
| <p>Bedford Central SD (NY)
4,100 students, K-12
John Boucher 914.584.3321
Ed Reader 914.334.1448</p> <p>Cedarburg SD (WI)
3,100 students, PK-12
Rick Leach 262.894.4284</p> <p>Chester Community Charter School (PA)
4,500 students, K-8
Jake Der Hagopian
jderhagopian@csmillc.com</p> <p>Dobbs Ferry SD (NY)
1,500 students, K-12</p> <p>Edgemont SD (NY)
2,029 students, K-12
Monica Sganga 914.450.0135</p> <p>Faribault PSD (MN)
3,500 students, K-12
Chad Wolff 612.716.1757
Jerry Robicheau 507.330.4524</p> <p>Gibraltar Area SD (WI)
517 students, PK-12
Stephen Seyfer 920.421.5101
sseyfer@gibraltar.k12.wi.us</p> <p>Holmdel PS (NJ)
3,000 students, PK-12
Vicky Flynn 201-486-2718
vflynn@holmdelschools.org</p> <p>Johnson Creek SD (WI)
570 students, PK-12
Richard Wrensch 920.988.4878</p> <p>Los Gatos-Saratoga JHSD (CA)
3,500 students, grades 9-12
Katherine Tseng kitseng@lgsuhdsd.org</p> <p>Middlesex County Vocational and Technical Schools (NJ)
2,100 students, grades 8-12
Keith Jones
kjdevonsrenaissance@gmail.com
Michael Affrunti
maffrunti@connellfoley.com</p> | <p>Ames Community SD (IA)
5,001 students, PK-12
Sabrina Shields-Cook
515.451.8306</p> <p>Highline PS (WA)
17,500 students, K-12
Angelica Alvarez
angelica.alvarez@highlineschools.org</p> <p>Hillsborough Township PS (NJ)
7,300 students, PK-12
Paul Marini pmarini@htps.us</p> <p>Monroe SD (WA)
6,000 students, PK-12
Jennifer Bumpus 425.232.5479
bumpusj@monroe.wednet.edu</p> <p>Newburgh Enlarged City SD (NY)
12,000 students, PK-12
Carol Mineo cmineo@necsd.net</p> <p>SD of Janesville (WI)
9,575 students, PK-12
Greg Ardrey 608.757.1677
gardrey@janesville.k12.wi.us</p> <p>North Penn SD (PA)
12,600 students, K-12
Tina Stoll 215.783.1817
stollti@npenn.org</p> <p>Oak Park Elementary SD 97 (IL)
5,700 students, PK-8
Jung Kim 847.331.7797
jkim@oop97.org</p> | <p>Anne Arundel County PS (MD)
85,000 students, K-12
Dr. Joanna Tobin 410-570-0366
jtobin@aacps.org</p> <p>Frederick County SD (MD)
43,250 students, PK-12</p> <p>Fort Worth ISD (TX)
75,000 students, K-12
Tobi Jackson
tobi.jackson@fortworthsparc.org</p> <p>Lincoln PS (NE)
42,000 students, K-12
Connie Duncan 402.419.0070</p> <p>Los Angeles USD (CA)
640,000 students, K-12
Monica Garcia 213.505.6122
Kelly Gonez
kelly.gonez@lausd.net</p> <p>Montgomery County PS (MD)
165,000 students, K-12
Brenda Wolff 240.740.3030</p> <p>San Francisco USD (CA)
50,000 students, K-12
Jenny Lam 415.699.5349
jennylam@sfsusd.edu</p> <p>Seattle PS (WA)
50,000 students, K-12
Brandon Hersey
brandon.hersey@seattleschools.org</p> |



PROMOTIONAL MATERIALS

The following pages contain examples of recruitment materials used in HYA superintendent searches.



(<https://>)

Superintendent – Holliston, MA

 PK-12 (<https://hyasearch.com/job-category/pk-12/>)  Northeast (<https://hyasearch.com/job-location/northeast/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

Apply Now



Job Description

Holliston Public Schools

Holliston, Massachusetts, a New England town located approximately 20 miles west of Boston, seeks an experienced and visionary leader to serve as its next Superintendent of Schools. This is a unique opportunity to lead a high-achieving school district in a community that deeply values education, collaboration, and the holistic development of its students.

The Community of Holliston

Holliston is a town that prides itself on its strong sense of community, historic charm, and rural character. With a population of approximately 15,000, Holliston offers a welcoming and engaging environment with a high level of volunteerism and community involvement. Holliston has a rich history. Established in 1724, Holliston is famously known for historic manufacturing of heavy footwear for farmers and sportsmen, which was produced in the Old Mill Building. The town center, with its classic New England architecture, is home to a variety of local businesses, including the historic Fiske's General Store, which has been a community hub for over 150 years. Holliston is known for its picturesque landscapes, including the popular Lake Winthrop and the Upper Charles River Trail, which provide ample opportunities for recreation and community gatherings. Blair Square on the Rail Trail is Holliston's meeting spot which hosts concerts, picnics, the annual holiday stroll and New Year's Eve First Night events. The Pinecrest Golf Club is a municipal golf course that has also made Holliston a popular place to visit.

Holliston's strong community spirit is further demonstrated by its active parent-teacher organizations, youth sports organizations, athletic boosters, and arts associations, all of which contribute to a vibrant and supportive environment for its schools. To learn even more about the Holliston community, please visit this [website \(https://www.townofholliston.us/313/Holliston-Community-Profile-Video\)](https://www.townofholliston.us/313/Holliston-Community-Profile-Video) or click here to see a video of our town.

The Holliston Public School District

The Holliston School District is made up of four schools: Sam Placentino Elementary School (PreK-2), Fred W. Miller Elementary School (grades 3-5), Robert H. Adams Middle School (grades 6-8), and Holliston High School (grades 9-12+). The district offers a **K-5 French Immersion program** and a **PreK-4 Montessori program** in addition to its Traditional program. Holliston is only one of two districts in Massachusetts that offer French Immersion. In 2024-25 the school enrollment was approximately 2700 students served by roughly 250 teachers and 500 total staff. The FY26 School Budget is \$44,372,069 (excl Benefits), Town Budget is \$77,874,232 and the Town's Public Debt Rating is AAA (S&P).

Holliston schools employ a data-driven approach to continually assess student needs and opportunities for growth. Holliston's elementary schools work to create a supportive and emotionally safe learning environment where students build regulation, resilience, and a sense of belonging through integrated SEL and PBIS practices.

In 2024, the Robert Adams Middle School (RAMS) was named a National Blue Ribbon School Awardee by the US Department of Education. RAMS was one of only nine schools in the state of Massachusetts, and the only middle school that received this distinctive honor for the category of Exemplary High Performing Schools that year. Holliston High School students are able to pursue an array of opportunities – including robust elective offerings, Seal of Biliteracy, Foreign Exchange Program, Computer Science Endorsement, Global Citizens Program, Internships and Senior Projects.

Holliston offers a full interscholastic sports program at the varsity, junior varsity, freshmen, middle school and unified levels; competing in the Tri-Valley League against towns such as Dedham, Westwood, Medfield, and Hopkinton. Students take part in a wide variety of co-curricular and extra-curricular activities with scores of clubs at the MS and HS levels. Holliston has strong theater programs at both the MS and HS levels and holds a district-wide "Art Saves Lives" art show each year.

The district's mission is to "collaboratively create a safe, inclusive environment that empowers all learners, through innovative teaching and learning, to be lifelong, active, global citizens." This mission is guided by a set of core values that emphasize:

- An emotionally and physically supportive, safe, and equitable school environment
- Effective communication between all constituents
- Leveraging technology to enhance innovative learning
- A strong sense of community enhanced by family and community partnerships
- Recognizing, celebrating, and appreciating individuality
- The power of student agency
- Providing varied opportunities for collaboration

The district's 2022-2027 Strategic Plan, "Building Bridges Together," supports the district's core values by focusing on developing strong communication, social and emotional well-being, teaching and learning, and talent and resources. As the schools enter 2028 and beyond, Holliston would look to its new forward-thinking educational leader to build upon the district's successes and navigate the challenges of the future to craft a plan that reflects the community's desire for high-quality educational opportunities for all students.

Qualifications

Holliston desires an experienced candidate who demonstrates collaborative and inclusive leadership, prioritizes instructional excellence, communicates clearly and effectively, creates and sustains a positive culture among students and staff, fosters equity, and constructively manages the complexities of relationships among and between stakeholders. The candidate should be licensed or eligible for licensure as a superintendent of schools in Massachusetts, hold a Master's degree in education or related field (Doctorate preferred), and have a minimum of 10 years in education, including teaching, central office and/or administrative experience. Experience with MSBA or other school building projects preferred. The position has a start date of July 1, 2026 with highly competitive salary and benefits commensurate with experience.

How to apply for this job?

1. Register for an account on the HYA website. Or, log in to the HYA website if you already have an account created. Click the Login/Register button at the top of the page to get started.
2. After logging in, click the Apply Now button at the top of this page.
3. You will be redirected to the Frontline Education website. This website is where you will submit your application. This website also will require its own unique login and password.

RELATED JOBS

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Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

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PK-12 (<https://hyasearch.com/job-category/pk-12/>) Midwest (<https://hyasearch.com/job-location/midwest/>)
Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

s:// Superintendent – Merritt Island, FL (<https://hyasearch.com/job/superintendent-merritt-island-fl/>)
PK-12 (<https://hyasearch.com/job-category/pk-12/>) Southeast (<https://hyasearch.com/job-location/southeast/>)
Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

s:// Superintendent – Hay Springs, NE (<https://hyasearch.com/job/superintendent-hay-springs-ne/>)
PK-12 (<https://hyasearch.com/job-category/pk-12/>) Midwest (<https://hyasearch.com/job-location/midwest/>)
Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

Posted By

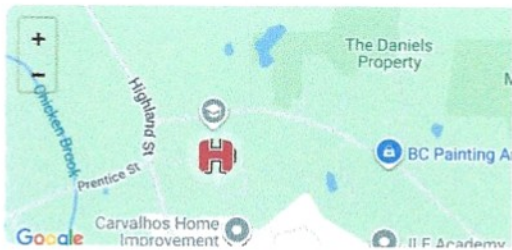


HYA (<https://hyasearch.com/employer/hya/>)
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Job Overview

- Region**
Northeast (<https://hyasearch.com/job-location/northeast/>)
- District Name**
Holliston Public Schools
- Website**
<https://www.holliston.k12.ma.us/> (<https://www.holliston.k12.ma.us/>)
- Twitter**
https://x.com/Holliston_PS (https://x.com/Holliston_PS)
- State**
Massachusetts
- District Size**
2,501-5,000 Students
- Grades**
K-12
- Associate(s)**
 - Susan Guiney (<https://hyasearch.com/employer/susan-zahra-guiney-ed-d-cht/>)
 - Caryn Shaw (<https://hyasearch.com/employer/caryn-shaw/>)
 - Doug Schuch (<https://hyasearch.com/employer/doug-schuch/>)

Job Location



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POSITION OPENING SUPERINTENDENT OF SCHOOLS



**TURTLE LAKE
SCHOOL DISTRICT**



**TURTLE LAKE
WISCONSIN**



WELCOME TO THE TURTLE LAKE SCHOOL DISTRICT

The Turtle Lake School District is seeking a Superintendent beginning July 1, 2026. TLSD offers an exceptional educational experience by blending the benefits of a close-knit community with the resources of a larger district. Here, every student is known, supported, and challenged. Academically, it provides a rigorous curriculum delivered by dedicated, high-quality staff who utilize innovative teaching and embedded technology to offer personalized instruction and small-group learning. The district is also proud of its outstanding, state-of-the-art facilities, which include a Fab Lab, an on-site swimming pool, a modern fitness center, and updated athletic fields, including a new track. Students have access to a wide range of co-curricular and extracurricular activities, from various sports to academic clubs and community service groups. This commitment ensures students are well-rounded, receiving a high-quality education that prepares them for post-secondary success while fostering a positive, safe, and collaborative "Laker Pride" environment.

Visit the Turtle Lake School District Website for more information:
www.turtlelake.k12.wi.us



QUESTIONS? Email HYA Associates
Mike Richie mikerichie@hyasearch.com
Scott Winch scottwinch@hyasearch.com

TIMELINE

Deadline to apply: January 30, 2026
1st round interviews: February 18-19, 2026
Finalist Day in District: February 25, 2026
Final interviews: February 25, 2026
Selection and announcement: Late February, 2026
Position to begin: July 1, 2026



To apply for the Turtle Lake Superintendent position
visit the Hazard, Young and Attea website at:
www.hyasearch.com or scan the QR code



HYA
HAZARD
YOUNG
ATTEA
ASSOCIATES

| | |
|---|--------------------------------------|
| 423
Students
PK-12 | 70
Staff
Members |
| \$8.4M
General Fund
Budget | \$2.36M
in Fund 46 |
| 71.4
Exceeds
Expectations
WI DPI Report Card | 95%
Attendance
Rate |
| 107
Square
Miles | 2025
WiRSA Teacher
of the Year |
| 20%
Students
Open Enrolled | 73%
HS Student
Activity Rate |
| \$125,000 to \$160,000
Anticipated
Salary Range | |

[\(https://hyasearch.com/\)](https://hyasearch.com/)[\(https://hyasearch.com/login-register/\)](https://hyasearch.com/login-register/)  

Superintendent – Auburn-Washburn USD, KS

 PK-12 (<https://hyasearch.com/job-category/pk-12/>)  Midwest (<https://hyasearch.com/job-location/midwest/>)Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)[Apply Now](#)

Job Description

The Auburn-Washburn Unified School District 437 is seeking a superintendent beginning on July 1, 2026, with a base salary range expected to be \$225,000 to \$275,000; other benefits to be negotiated.

Auburn-Washburn School District serves 6,000 students in 128 square miles located in southwest Topeka, the state's Capital City, and Shawnee County. The district has 1,100 employees and an annual operating budget of \$132 million.

Auburn-Washburn is an amazing place to learn and work due to our engaged patron and business community, informed parents who value the importance of an exemplary education, dedicated and talented administrators, teachers, and support staff, and outstanding students who come to school ready and willing to do their very best. We also provide a large variety of co-curricular, performing and fine arts, and athletic opportunities, and our students perform and compete extremely well with students in Kansas and the nation.

The Auburn-Washburn School District is dedicated to meeting the strengths, needs, and dreams of every child, every day. Our district includes seven elementary schools, each serving about 400 students. These schools feed into Washburn Rural Middle School and the new Washburn Rural North Middle School, which serves students in grades 6–8 and average about 700 students each. Both middle schools lead to Washburn Rural High School, a comprehensive 6A high school with just under 2,000 students. In addition, the district offers an early childhood program for 250 three- and four-year-olds and an alternative learning center that provides tailored educational opportunities for students who need a different pathway to success. Across all schools, relationships come first. We work to build strong connections with students and families, creating the foundation for high academic achievement and the development of skills for lifelong success.

Our Mission: Inspiring, challenging, and preparing every child, every day.

Vision: Auburn-Washburn schools provides a safe, enjoyable, and challenging school environment where students have the opportunity to achieve their maximum individual education potential. All students receive a balanced education where traditional academics are taught, creativity and innovation are cultivated, and skills for success are developed; preparing them to assume roles as responsible citizens in a global community, the workplace, and in life.

Core Values: We believe learning is a lifelong process. The following values will help realize our vision:

1. We believe in the value and uniqueness of each student:

1. Each student has different needs.
2. Each student should have the opportunity, and be encouraged, to reach their potential.
3. Each student is entitled to a safe, current, and well-maintained school environment.

2. We believe that excellence in education is a multifaceted process:

1. Excellence requires building meaningful relationships with all stakeholders and especially with students.
2. Excellence requires the commitment and judicious stewardship of community resources.
3. Excellence prepares students to become happy, responsible, and productive citizens; to successfully live and work in a complex, ever-changing world.

4. Excellence is a combination of academic performance and skills for success.
5. Excellence must be a dynamic and engaging process in order to meet changing needs.
6. Excellence requires rigorous assessment and feedback of both students and faculty staff.
7. Excellence requires focus on the future.
8. Excellence depends upon effective resource management.
9. Excellence, both academic and skills for success, should be recognized and celebrated.
3. We believe that respect and responsibility are essential components of an excellent education:
 1. Everyone deserves to be treated with dignity and respect.
 2. Effective communication enhances trust and cooperation.
 3. Each student is responsible for their own actions.
 4. Responsibility for public education rests jointly with students, parents, teachers, and community.

Visit the Auburn-Washburn School District Website for more information: <https://usd437.net/> (<https://usd437.net/>)

Top 10 most valued leadership qualities as identified by a stakeholder survey (October 2025)

1. Integrity and transparency
2. Strong communication skills
3. Ability to build consensus and commitment when making tough decisions
4. Collaborative leadership style
5. Approachability and visibility in schools/community
6. Equity-mindedness and inclusivity
7. Listens to and represents the interests and concerns of stakeholders
8. Develop and direct an effective administration team
9. Fosters a culture of trust, professionalism, and fairness
10. Strong morals, ethics, and values

Preferred Qualifications:

- Doctoral degree
- District-level administrative experience
- Experience working closely with a School District Governing Board
- Responsive and accountable; willing to accept responsibility, open to being challenged, and able to engage in difficult conversations without being confrontational
- An exceptional communicator with outstanding oral and written skills, an authentic and active listener, inspiring speaker, and successful experience with media communication
- Ability to advocate on behalf of the district with key stakeholders including government officials
- An exceptionally approachable, immersive presence in the schools and community
- An earned reputation for impeccable integrity, authentic humility, and sincere empathy
- An even-keeled leader who is always well prepared, makes sound decisions, communicates them clearly, and brings a steady presence to the role
- Unwavering commitment to and focus on student and staff success
- Articulates a compelling vision for the district and ensures strategies, tactics, and conditions are in place and executed to achieve it
- A self-reflective leader who also seeks out the counsel of others
- Having led a school district of similar size

PLEASE INCLUDE IN YOUR FRONTLINE APPLICATION:

1. Cover letter (stating interest and unique qualifications for the position) – be sure to save the name of the district in the document title
2. Full resume/vitae
3. Three current letters of recommendation
4. Copy of Superintendent license (regardless of state) or evidence of eligibility for Superintendent license
5. Contact information of three additional references different than the reference letters

Search Timeline – All Application Materials Due By: February 9, 2026

| | |
|------------------------|---|
| January 20, 2026 | Release District Leadership Profile Report (with stakeholder input) |
| February 16, 2026 | Slate of candidates presented to the Board |
| Sat. February 28, 2026 | Board first-round interviews |
| March 11, 2026 | Finalists Day in the District |
| March 12, 2026 | Board conducts final interviews |
| Mid March 2026 | Superintendent's hiring approved and announced |
| July 1, 2026 | Superintendent contract formally begins |

For any questions regarding the Auburn-Washburn District Superintendent search contact either HYA associate, do not contact School Board members:

Mike Richie, Hazard, Young, Attea & Associates

Email: mikerichie@hyasearch.com (mailto:mikerichie@hyasearch.com)

Frank Henderson, Hazard, Young, Attea & Associates

Email: frankhenderson@hyasearch.com (mailto:patneudecker@hyasearch.com)

How to apply for this job?

1. Register for an account on the HYA website. Or, log in to the HYA website if you already have an account created. Click the Login/Register button at the top of the page to get started.
2. After logging in, click the Apply Now button at the top of this page.
3. You will be redirected to the Frontline Education website. This website is where you will submit your application. This website also will require its own unique login and password.

RELATED JOBS

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PK-12 (<https://hyasearch.com/job-category/pk-12/>) Midwest (<https://hyasearch.com/job-location/midwest/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

Superintendent – Walpole, MA (<https://hyasearch.com/job/superintendent-walpole-ma-2/>)

PK-12 (<https://hyasearch.com/job-category/pk-12/>) Northeast (<https://hyasearch.com/job-location/northeast/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

Superintendent – Joseph, OR (<https://hyasearch.com/job/superintendent-joseph-or/>)

PK-12 (<https://hyasearch.com/job-category/pk-12/>) West (<https://hyasearch.com/job-location/west/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

Superintendent – Coos Bay, OR (<https://hyasearch.com/job/superintendent-coos-bay-or/>)

PK-12 (<https://hyasearch.com/job-category/pk-12/>) West (<https://hyasearch.com/job-location/west/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

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Job Overview



Region

Midwest (<https://hyasearch.com/job-location/midwest/>)



District Name

Auburn-Washburn Unified School District 437



Website

<https://usd437.net/> (<https://usd437.net/>)



Twitter

<https://twitter.com/USD437> (<https://twitter.com/USD437>)



State

Kansas



District Size

5,001-10,000 Students



Grades

K-12

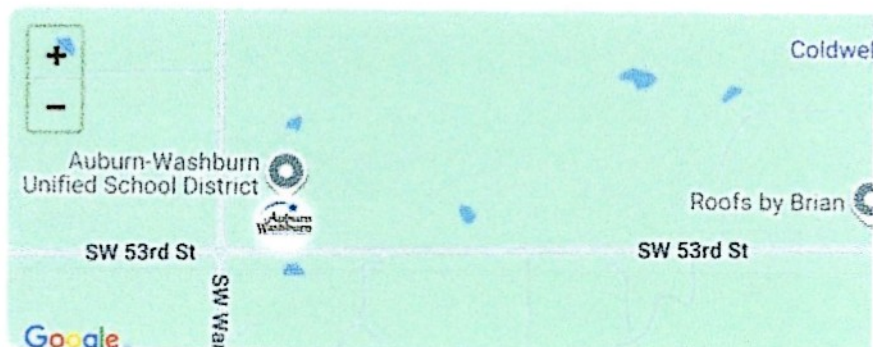


Associate(s)

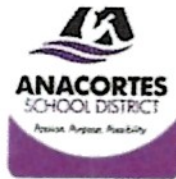
Mike Richie (<https://hyasearch.com/employer/mike-richie-ed-d/>)

Frank Henderson (<https://hyasearch.com/employer/frankhenderson/>)

Job Location



Leaflet (<https://leafletjs.com>)

[\(https://hyasearch.com/\)](https://hyasearch.com/)[\(https://hyasearch.com/login-register/\)](https://hyasearch.com/login-register/) 

Superintendent- Anacortes, WA

 PK-12 (<https://hyasearch.com/job-category/pk-12/>)  Northwest (<https://hyasearch.com/job-location/northwest/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)

[Apply Now](#)


Job Description

*The **Anacortes School District** Board of Directors presents*

an invitation to apply for the position of

SUPERINTENDENT

Anacortes School District seeks a highly qualified, collaborative, and visionary instructional leader to work closely with the school board, staff, families, and community to ensure success for every student. The successful candidate will be expected to serve as the district's primary instructional leader and lead the implementation of the strategic plan, with particular emphasis on educational equity, advancing teaching and learning, supporting social and emotional learning, strengthening partnerships, and exercising responsible stewardship of resources.

District level experience with instructional improvements, district operations, and effective financial oversight are desired as well as familiarity with Superintendent expectations within Washington State's public school system. The ability to navigate the financial realities and broad operational responsibilities inherent in leading a small district is critical. A demonstrated ability to develop and sustain positive relationships with all stakeholders, engage diverse perspectives, build trust across the community, and actively engage in community events, groups, and activities is also essential.

Minimum Qualities/Qualifications

- Master's Degree in Educational Leadership or related field
- Current WA State Superintendent Certification (or willingness to obtain)
- Prior successful experience as an educational leader
- Proven ability to lead district-level instructional improvement initiatives
- Experience with district operations and effective financial oversight in a K-12 setting
- Understanding of Washington State's public school system, including recent state legislation and funding mechanisms and their local impacts
- Exceptional leadership and management skills
- Effective problem-solving and conflict resolution skills
- Strong interpersonal skills, including transparent and respectful interactions with students, staff, families, and community members, with the ability to engage diverse perspectives and build trust
- Demonstrated exemplary communication skills in listening, speaking, and writing
- Commitment to equity and culturally responsive practices
- Models high standards of professional and ethical behavior at all times and operates consistently with integrity

Preferred Qualities/Qualifications

- Successful experience as a superintendent
- District level administrative experience in K-12 public education

- Doctoral Degree (PhD or EdD) in Educational Leadership or related field
- Experience working in a small district where leaders assume multiple operational roles
- Demonstrated success in managing complex budgets, navigating financial constraints, and maximizing limited resources
- Experience partnering with community members, consultants, higher education, and local organizations in support of public education
- Experience working closely with a Board of Directors in a collaborative governance model
- Experience bargaining with union groups

About the District

Welcome to the Anacortes School District! Located on beautiful Fidalgo Island, Anacortes is a leader in public education, with a strong vision for teaching and learning. Our strategic plan is anchored by four pillars: Quality Instruction and Curriculum, Partnerships, Social-Emotional Learning, and Stewardship, which guide our work and decisions, ensuring that every student rises to their fullest potential.

Anacortes schools benefit from highly supportive families, community members, and an impressive network of volunteers. Our unique school-community partnership resulted in one of the highest school levy 'yes votes' in the State of Washington. We serve more than 2,500 students, each with diverse thoughts, beliefs, perspectives, and experiences.

The district offers robust learning and enrichment opportunities for all students, including highly capable programs, special education, English Learner support, Career & Technical Education including our partnership with Northwest Career and Technical Academy, a technology initiative providing laptops for all students, and strong arts, music, athletics, and electives across all schools. Our mission is to inspire every student daily through high-quality instruction that fosters creativity, personal growth, character development, and a lifelong passion for learning. We're passionate about fostering a lifelong love of learning and making a difference in our students' lives.

About the Community

Anacortes, the crown jewel of Fidalgo Island, is conveniently situated halfway between Seattle & Vancouver BC, and is the destination point for the San Juan Islands and International Ferry runs. The island is known for its historic waterfront, 50-miles of hiking trails, and a mix of annual festivals. Its year-round music scene is lively and visitors can soak up a range of tunes from rock to bluegrass to jazz at outside venues during the summer and restaurants and bars throughout the year. The culinary scene is ever-growing and you'll find a variety of restaurants with farm-to-table menus, scratch and house-made ingredients.

Strengths and Opportunities

The School Board has selected the search firm Hazard, Young, Attea & Associates (HYA) to gather input from students, staff, families and community members regarding strengths and challenges facing the district as well as the most important leadership qualities and characteristics participants believe the School Board should consider in selecting the next superintendent. This input will be used to develop a Leadership Profile Report that will be shared with the public and prospective candidates. The report will also be considered by the Board in making screening and selection decisions.

Application Requirements

Application Requirements

1. Cover Letter
2. Resume
3. Completed Application Form at HYA website
4. A minimum of three written references

Application Process & Timeline

Application deadline: February 6, 2026; 4:00 p.m. PST

Announcement of appointment: Late March

Superintendent begins: July 1, 2026

Compensation

The Anacortes School District Board of Directors will negotiate a compensation and benefit package that is regionally competitive based on education and experience.

Confidential Inquiries Please Contact:

Kristine McDuffy, 360-391-4934, kristinemcduffy@hyasearch.com (mailto:kristinemcduffy@hyasearch.com)

John Bash, 360-269-8224, johnbash@hyasearch.com (mailto:johnbash@hyasearch.com)

HYA Senior Search Consultants

How to apply for this job?

1. Register for an account on the HYA website. Or, log in to the HYA website if you already have an account created. Click the Login/Register button at the top of the page to get started.
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3. You will be redirected to the Frontline Education website. This website is where you will submit your application. This website also will require its own unique login and password.

RELATED JOBS

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 PK-12 (<https://hyasearch.com/job-category/pk-12/>)  Southwest (<https://hyasearch.com/job-location/southwest/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)



Superintendent – Creswell, OR (<https://hyasearch.com/job/superintendent-creswell-or/>)

 PK-12 (<https://hyasearch.com/job-category/pk-12/>)  West (<https://hyasearch.com/job-location/west/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)



Superintendent – Juneau, AK (<https://hyasearch.com/job/superintendent-juneau-ak/>)

 PK-12 (<https://hyasearch.com/job-category/pk-12/>)  West (<https://hyasearch.com/job-location/west/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)



Superintendent – Merkel, TX (<https://hyasearch.com/job/superintendent-merkel-tx/>)

 PK-12 (<https://hyasearch.com/job-category/pk-12/>)  Southwest (<https://hyasearch.com/job-location/southwest/>)

Superintendent or CEO (<https://hyasearch.com/job-type/superintendent-or-ceo/>)



Posted By

Job Overview

**Region**

Northwest (<https://hyasearch.com/job-location/northwest/>)

**District Name**

Anacortes School District

**Website**

<https://www.asd103.org/> (<https://www.asd103.org/>)

**State**

Washington

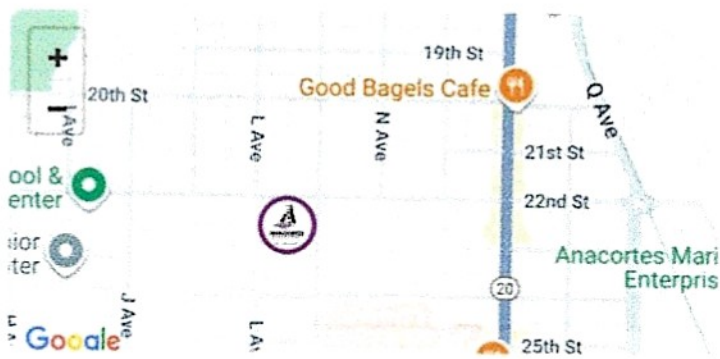
 **District Size**
2,501-5,000 Students

 **Grades**
K-12

 **Associate(s)**
John Bash (<https://hyasearch.com/employer/john-bash/>)

Kristine McDuffy (<https://hyasearch.com/employer/kristine-mcduffy/>)

Job Location



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| | |
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Draft Desired Successor Superintendent Characteristics Old Bridge Township Public Schools

After reviewing input from the governing body and district, the Old Bridge Township Board of Education seeks a strong educational leader who is **engaged, collaborative, transparent**, and who possesses the following characteristics:

1. **Outstanding Communicator:** This characteristic is mentioned multiple times as was the need for someone who can connect with diverse stakeholders, partner with the board, and unify the community.
2. **Fiscal Acumen & Strategic Planning Experience:** The input repeatedly highlights financial challenges (revenues, taxes, S2 impact) and the need for long-range and strategic planning to address them. This characteristic is directly mentioned many times and as being crucial for the district's future.
3. **Visible, Accessible, and Community-Oriented:** This includes being present at events, having a personable demeanor, and the ability to assimilate with and understand the community's diverse needs and expectations.
4. **Ability to Partner with and Support the Board (and Unify):** The participants emphasized the need for a superintendent who can work effectively with a board that has multiple perspectives, can bring them together, and fosters a true partnership.
5. **Strong Operational Knowledge & Administrative Experience at the District Level:** This includes practical experience, the ability to hit the ground running, make critical decisions, and hold others accountable. This demonstrates the capability to manage the complexities of a district of similar size and complexities.

Additional Highly Desired Characteristics:

- **Experience and Understanding of Special Education Programs:** Highly desirable and mentioned as being important for serving all students.
- **Ability to Handle Stress & Be Calm Under Fire:** The district is described as potentially divisive and challenging, requiring a resilient leader who can unify.
- **Advocate for the District in Trenton & for all Student Programs:** Essential for securing resources and ensuring the needs of all students are met.
- **Leader who is Proactive, Forward-Thinking, and Follows Through:** There is a desire for a leader who will drive positive change and accountability.
- **Successful Experience in a District of Similar Size, Complexity, and Diversity:** Practical experience in a comparable environment is highly valued.
- **Hybrid Background:** A leader who understands both educational and financial aspects.

The successful candidate will:

- Have exemplary, executive-level educational leadership experience of comparable scope and complexity
- Have or be immediately eligible for a New Jersey School Administrator Certificate
- Doctoral or terminal degree desirable

Compensation:

- Salary in the range of \$270,000 depending upon actual experience, qualifications, experience, and subject to negotiations. Benefits similar to other district employees, applicable NJ statutes and subject to negotiation.
- Application deadline: September 26, 2025

Interested and qualified individuals can learn more about the position:

<https://hyasearch.com/job/superintendent-old-bridge-nj/>



Non-Collusion Form and Tax Compliance Certification

Attachment C

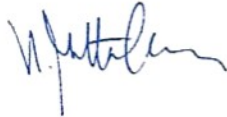
CERTIFICATION OF GOOD FAITH & NON-COLLUSION

The undersigned certifies under pains and penalties of perjury that this bid 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.

CERTIFICATE OF STATE TAX COMPLIANCE

Pursuant to M.G.L. c.62C, §49A, the undersigned acting on behalf of the Contractor, certifies under the penalties of perjury that, to the best of the undersigned's knowledge and belief, the Contractor is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.*

** Signature of authorized individual submitting bid/proposal



Printed Name Nanci Perez

date 9/2/26

Name of Business (if applicable)

HYA Corporation

*** Social Security or Federal Tax Identification Number

83-4496723

* The provision in the Attestation relating to child support applies only when the Contractor is an individual.

** Approval of a contract or other agreement will not be granted unless the applicant signs this certification clause.

***Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of M.G.L. c.62C, §49A.

SIGNATURES

(IF AN INDIVIDUAL)

Date _____, 2026

Signature of Proposer (SEAL) (Owner and Proprietor)

Business Name D/B/A _____

Business Address _____

-- (IF A CO-PARTNERSHIP)

Date _____, 2026

Firm Name _____

_____(SEAL)

By _____(SEAL)

Business Address _____

Names and Addresses _____

of all

Members of Firm

-- (IF A CORPORATION)

Date _____ September 2, 2026

Corporate Name HYA Corporation

By Nanci Perez, President

President or Authorized Agent*



Business Address 909 W. Euclid Avenue #926, Arlington Heights, IL 60006

*Statement of authorization, duly signed by proper authority, to be attached hereto.



HYA looks forward to the possibility of working with the Sudbury School Committee and assisting with the selection of a new leader. Please contact Dr. George Perry at (718) 760-1974 or at georgeperry@hyasearch.com with questions or requests for additional information.

HYA Corporation
909 W. Euclid Ave #926
Arlington Heights, IL 60006
hya@hyasearch.com
847-250-7261



SUPERINTENDENT SEARCH PRICE PROPOSAL

September 4, 2026

HYA | HAZARD
YOUNG
ATTEA
ASSOCIATES

Hazard, Young, Attea & Associates
909 W. Euclid Ave #926, Arlington Heights, IL 60006
Tel 847.250.7261 | hya@hyasearch.com | hyasearch.com

TABLE OF CONTENTS

| | |
|--|--------|
| Table of Contents | Page 2 |
| Price Proposal
Attachment A and Description | Page 3 |
| Signature Search Brochure | |

**Attachment A
Price Proposal**

(To be submitted as separate PDF file or in a separate sealed envelope from the Technical Proposal)

The price proposal (one original copy) must be submitted without "conditions or exceptions" and must be submitted under separate cover and in a sealed envelope.

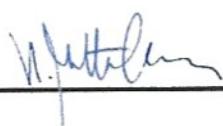
The price proposal set forth in this proposal shall constitute full and complete compensation for the services to be provided by the Consultant/Firm. There shall be no reimbursement for out-of-pocket or other expenses incurred by the Consultant in connection with the performance of the services. Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the Proposer. Any exceptions may result in the rejection of the proposal.

Price Proposal for Sudbury Public Schools Superintendent Search:

\$ 26,800 Total Fixed Fee Contract

Price Total Fixed Fee Contract Price in words:

The Price Proposal must include a rate schedule for the Lead Consultant or other relevant personnel for possible services to be added outside the Scope of Work. Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the Consultant.

Signature:  Date: 9/2/26

Title: President

Company: HYA Corporation Tel: 847-250-7261

Address: 909 W. Euclid Avenue #926

City: Arlington Heights State: IL Zip: 60006

Email: hya@hyasearch.com

PRICE PROPOSAL

In consideration for Services, the Sudbury Public Schools (the District) will pay to HYA Corporation:

- Consulting Fee for the search in the amount of \$26,800. This fee is due in two installments:
 - 50% will be invoiced upon execution of the contract/letter of agreement
 - 50% will be invoiced upon presentation of the slate
- Fixed fee includes advertising package 1 or 2 and targeted posting, and third-party due diligence options based on the RFP.

| Service: | Included in Fee: | Optional Enhancements: |
|----------------------------------|---|---|
| Associate Days (On-site/Virtual) | <p>Six in-person/virtual days in the district interacting with the School Committee and/or community for:</p> <ol style="list-style-type: none"> 1. Planning Meeting 2. Presentation of the <i>Leadership Profile Report</i> 3. Community Engagement Sessions 4. Candidate Screening 5. Presentation of the Slate 6. Finalist Selection <p>Associate responsibilities for the recruitment and selection phases, and associate/superintendent/committee transition meeting (reference attached HYA Signature Search Process p.3)</p> | |
| Community Engagement | Up to 24 Community Engagement sessions for Interviews, Focus Groups, Town Hall Meetings, as decided by the School Committee. | <p>HYA's research-based survey in English and Spanish with a survey report. (reference HYA Signature Search Process p. 7. \$3,000 option not included)</p> <p>Addition of customized questions, 10 forced-choice questions and 3 open-ended questions for \$1,500.</p> <p>Additional world languages (professionally translated) for \$550 per language. A quote will be provided for custom question translations.</p> |

| Service: | Included in Fee: | Optional Enhancements: |
|------------------|--|--|
| Advertising | <ul style="list-style-type: none"> Listed on HYA's active searches webpage (25,000+ pageviews per month) Full webpage dedicated to your search K12JobSpot posting (for the length of the search) Postings on HYA's social media accounts Advertising Package 1 or 2 (reference HYA Signature Search Process pp. 8, \$3,050 option included) ALAS & NABSE (posting reference HYA Signature Search Process p. 9, \$850 option included) MASS and MASC posting | See Advertising Services in the Signature Search Brochure for details and other options. |
| Background Check | <p>HYA Associates screen and conduct reference checks on candidates.</p> <p>Comprehensive independent third-party executive due diligence investigation for the finalist candidate (reference HYA Signature Search Process p. 10, \$1,950 option included)</p> | See Due Diligence Services in the Signature Search Brochure for details, options are \$1,100 or \$1,950 per candidate. |

Other Considerations:

If the School Committee chooses to reimburse candidates for travel for interviews, candidates will submit the expenses directly to the District for reimbursement.

Fixed Price

The Associates do not work on an hourly basis. We complete the necessary work, regardless of hours, as detailed in this proposal. Throughout the search process the Associates will be available to counsel with the Committee about the search. We pride ourselves on the level of support and service we offer to the Committee during this process and are available in person as well as via email, phone, and text. The Associates will assist the Committee until the Committee determines it has found the appropriate candidate for the position.

Transition Services

Complimentary enrollment into the HYA Transition Academy is included as part of the proposal. HYA offers optional transition services that would benefit the Committee and

Superintendent. Details on the services and costs on page 11 of the Signature Search Process.

Services and pricing detailed in this proposal are valid for 90 days from the date of opening. Services are rendered within 14 days of School Committee approval. Services and pricing detailed in this proposal are valid for 90 days from the date of opening. Services are rendered within 14 days of School Committee approval.

HYA looks forward to the possibility of working with the School Committee and assisting with the selection of a new leader. Please contact Dr. George Perry at (718) 760-1974 or at georgeperry@hyasearch.com with questions or requests for additional information.

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909 W. Euclid Ave #926
Arlington Heights, IL 60006
hya@hyasearch.com
847-250-7261

Signature Search Process

HYA | HAZARD
YOUNG
ATTEA
ASSOCIATES



The HYA Difference

National Reach – Local Focus

Established in 1987, Hazard, Young, Attea & Associates (HYA) is one of the oldest and largest search firms having assisted more than 1,400 school boards select exceptionally talented leadership in school systems across the nation, large and small, urban and rural. HYA's reputation and experience make it one of the preeminent school search firms in the nation and a standard which others often emulate. HYA Associates are located across the country to conveniently serve clients and are thus uniquely qualified to bring local - as well as national - perspectives, knowledge, experience, and connections to each search.

Communication

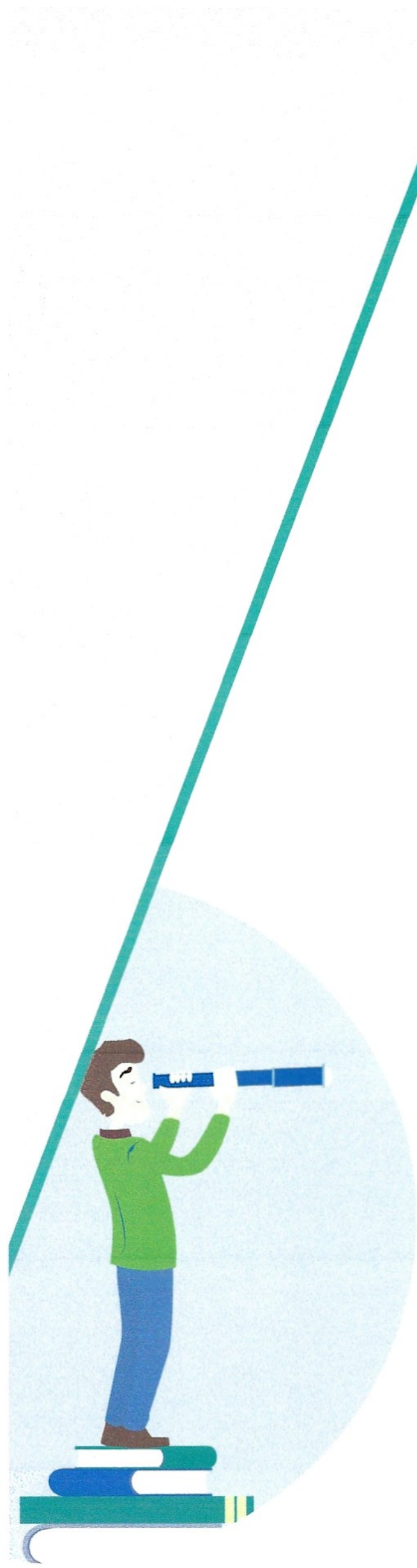
Communication and organization are critical to successful searches. HYA uses web-based delivery systems that give our clients anytime, anywhere access to all documents regarding the search. Whether through a tablet, smart phone, laptop or desktop computer, the Board and the search Associates have confidential access to all information associated with the search in an organized, transparent, and timely manner.

Executive Oversight

Every HYA search has executive oversight by the HYA President and a project manager to ensure all details are carefully managed. HYA has professionally staffed offices, a technological infrastructure, and a staff of full-time employees. Our tech team serves as a resource to school districts for linking the online community survey and other search materials to their website. These resources make HYA capable of responding to requests in a very timely fashion.

Research Based

HYA has over 30 years of experience supporting school districts in improving student outcomes. HYA's community engagement process employ research-based approaches to identifying the goals, needs, and priorities of the school system along with the desired characteristics of its next leader. The Engage Phase was developed based on research on effective leadership. The resulting Community and Leadership Profile Report provides information on the current state of the District, essential information the Board will use in the selection process and the new leader can use day one of employment. Furthermore, by blending consulting, professional service, and technology, HYA offers transition services and an analytics infrastructure to help the Board and their new leader better understand the interrelationships among school functions, and the impact of decisions and expenditures on student outcomes.

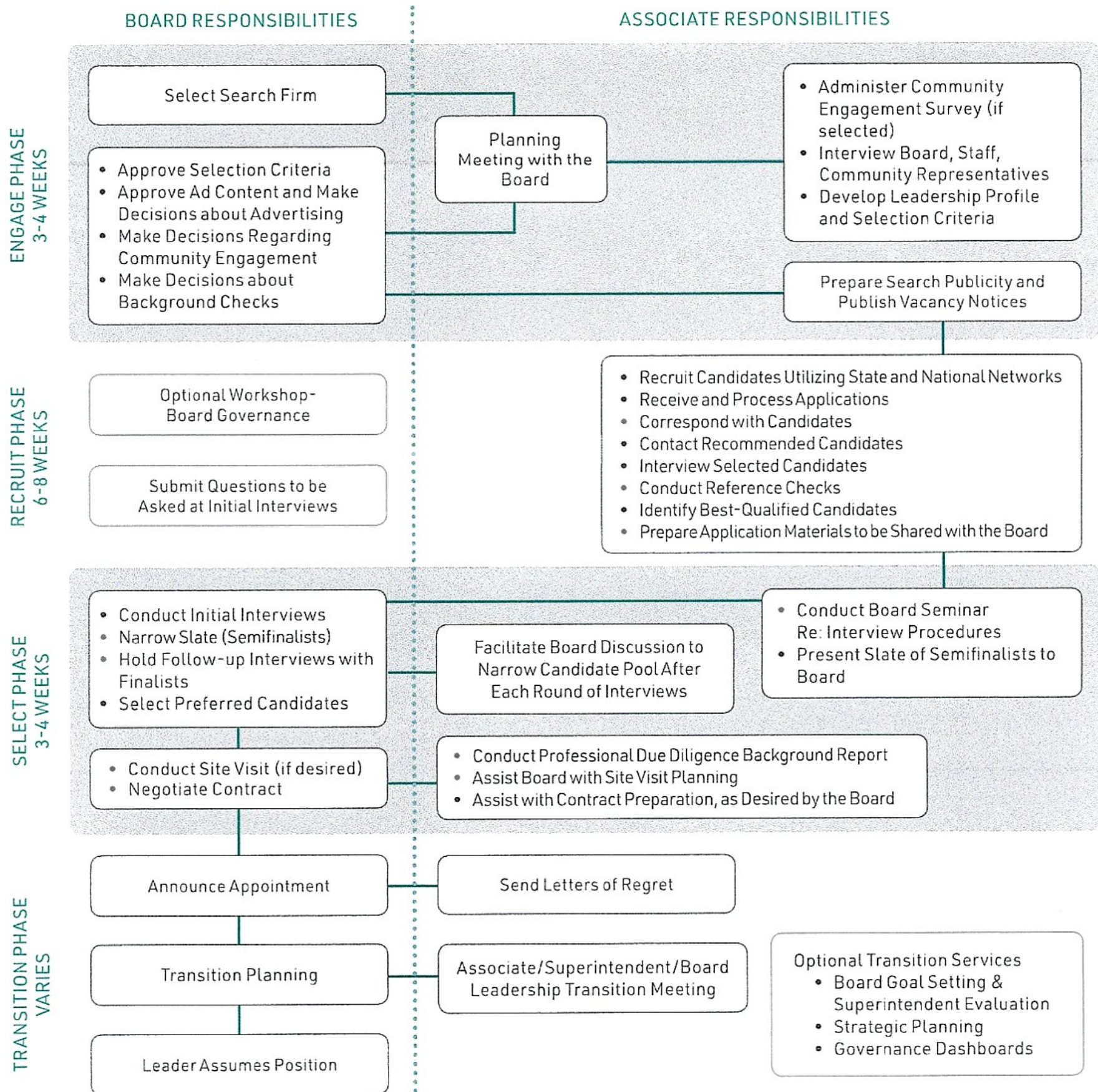


More Than a Background Check – Executive Due Diligence

HYA Signature Search Process

HYA offers comprehensive and expanded background checks completed by independent third-party investigators and includes an executive summary allowing for an analysis of findings, not simply dozens of articles and documents for Board members to read. The investigative procedures are comprehensive and thorough with a focus on the public school landscape - well beyond what constituents could produce through a simple internet search. This includes on-site research of primary source documents at relevant county court houses for civil and criminal record history. Additionally news and social media investigations provide a better understanding of a candidate's leadership style, public relations skills, and reputation.

HYA Signature Search Process





The Four Phases of HYA's Signature Search

The process outlined represents a prototypical search. Upon selection, the Associates will meet with the Board to discuss this process and modify it to meet the Board's unique needs. The following is a description of each phase in the search



Engage

The Engage phase consists of designing and planning a process of engaging the Board and stakeholders through interviews, online surveys (available in world languages), and focus groups. Information from these interactions assists the Board in developing a leadership profile and selection criteria that match the priorities of the community and that meet the unique needs of the local district. This disciplined, inclusive and research-based approach ensures all stakeholders have the opportunity to be a part of the search process and provides valuable feedback about the school district based on HYA's local research and professional understanding of the district's standing in the broader marketplace. Survey options are detailed on page 7 of this brochure.





Recruit

The Recruit phase consists of leveraging HYA's extensive national network of Associates and incorporating advertising strategies (as selected and paid for by the Board pursuant to pages 8 and 9 of this brochure) that results in the identification and recruitment of exceptionally talented leaders. HYA can also recruit non-traditional candidates, i.e. executives that have worked in business, military, private or public sector. HYA works in close partnership with state and national organizations with numerous Associates serving on those Boards.



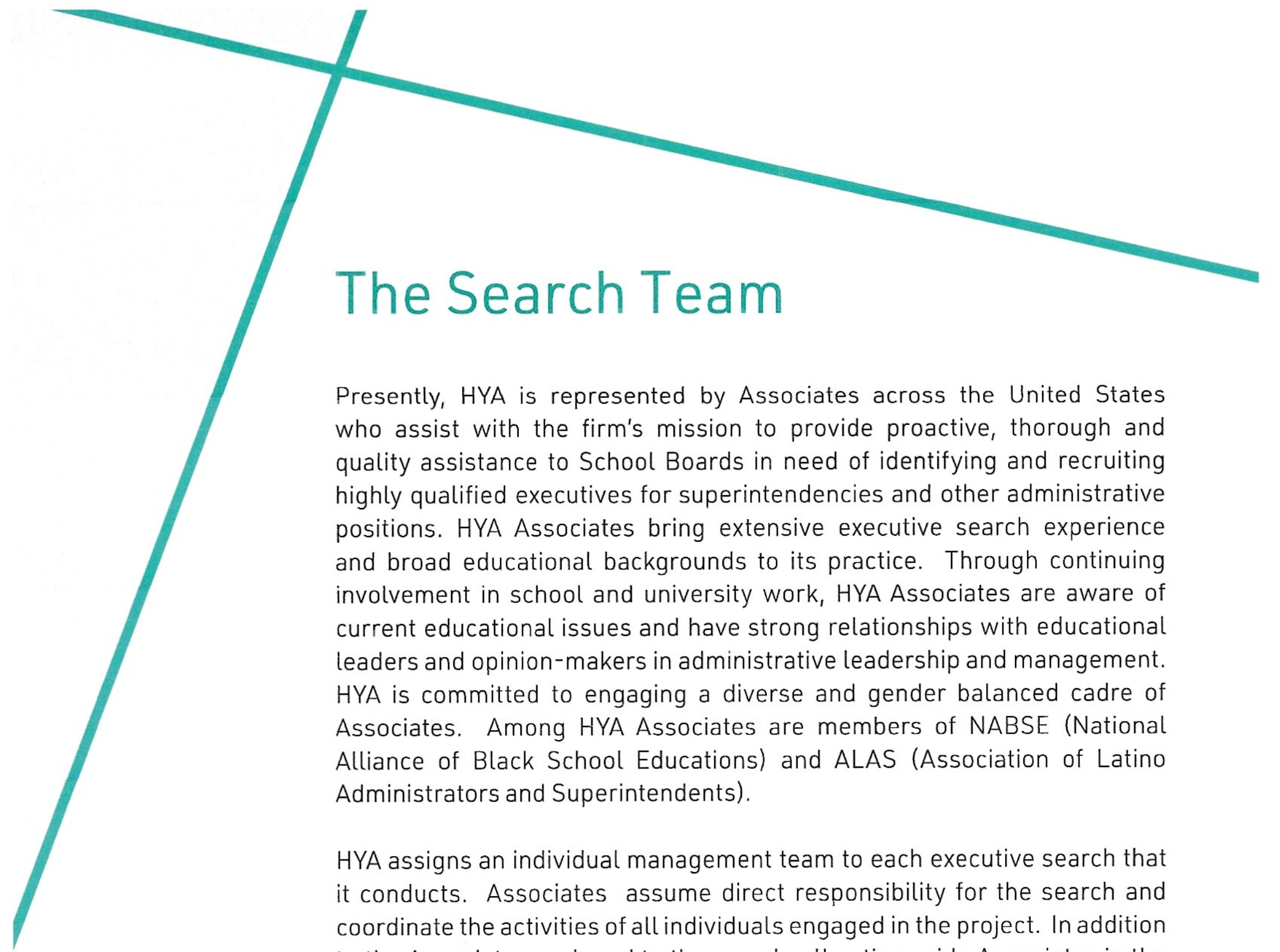
Select

The Select phase consists of providing the Board with a slate of candidates that were interviewed by HYA Associates using the Leadership Profile established by the Board. HYA's Associates are committed to spending the necessary time and energy on the details to find the right candidates to bring to the Board. The search team then facilitates the Board interviews and appointment process including reviewing candidates' references. HYA's ability to gain important background information regarding candidates - beyond what appears on an individual's resume - is a unique and distinguishing characteristic of HYA, and is attributable to the integrity of the firm, Associates, and the vast networks of professional relationships built through years in the education field. A workshop on interviewing and construction of interview questions is facilitated by the Associates for the Board. Executive due diligence including formal background and media checks complete the Select phase (as selected and paid for by the Board pursuant to page 10 of this brochure).



Transition

The Transition phase consists of assisting the Board and new Superintendent to assure a successful transition. Appointing a new leader is the first step toward accomplishing organizational and student goals for success. Included in the search fee is a transition meeting with the new Superintendent and representative(s) of the Board regarding the information learned throughout the search process, in particular, the Community and Leadership Profile Survey. Additional transition services are available (as selected and paid for by the Board pursuant to page 11 of this brochure).



The Search Team

Presently, HYA is represented by Associates across the United States who assist with the firm's mission to provide proactive, thorough and quality assistance to School Boards in need of identifying and recruiting highly qualified executives for superintendencies and other administrative positions. HYA Associates bring extensive executive search experience and broad educational backgrounds to its practice. Through continuing involvement in school and university work, HYA Associates are aware of current educational issues and have strong relationships with educational leaders and opinion-makers in administrative leadership and management. HYA is committed to engaging a diverse and gender balanced cadre of Associates. Among HYA Associates are members of NABSE (National Alliance of Black School Educators) and ALAS (Association of Latino Administrators and Superintendents).

HYA assigns an individual management team to each executive search that it conducts. Associates assume direct responsibility for the search and coordinate the activities of all individuals engaged in the project. In addition to the Associates assigned to the search, all nation-wide Associates in the firm are tasked with identifying prospective candidates.

HYA has professionally staffed offices, a technological infrastructure and a full-time employed staff; thus, HYA is capable to respond to any request the Board may have on the Board's time schedule. Finally, each search has executive oversight by the HYA President and project manager to ensure no detail is overlooked. HYA's office staff, which is highly knowledgeable and pleased to assist at any time, is available to the Board from 8:00 a.m. to 5:00 p.m. CST, Monday through Friday.

HYA believes that communication and organization are critical to successful searches. Our delivery systems give the Board anytime, anywhere access to all documents regarding the search. The Board and its Associates can have confidential access to all information associated with the search in a cloud based, organized and timely manner.

Community and Leadership Profile Survey

HYA's online survey employs a research-based approach to identifying the goals, needs, and priorities of the school system along with the desired characteristics of its next leader. The survey was developed based on research on effective leadership.

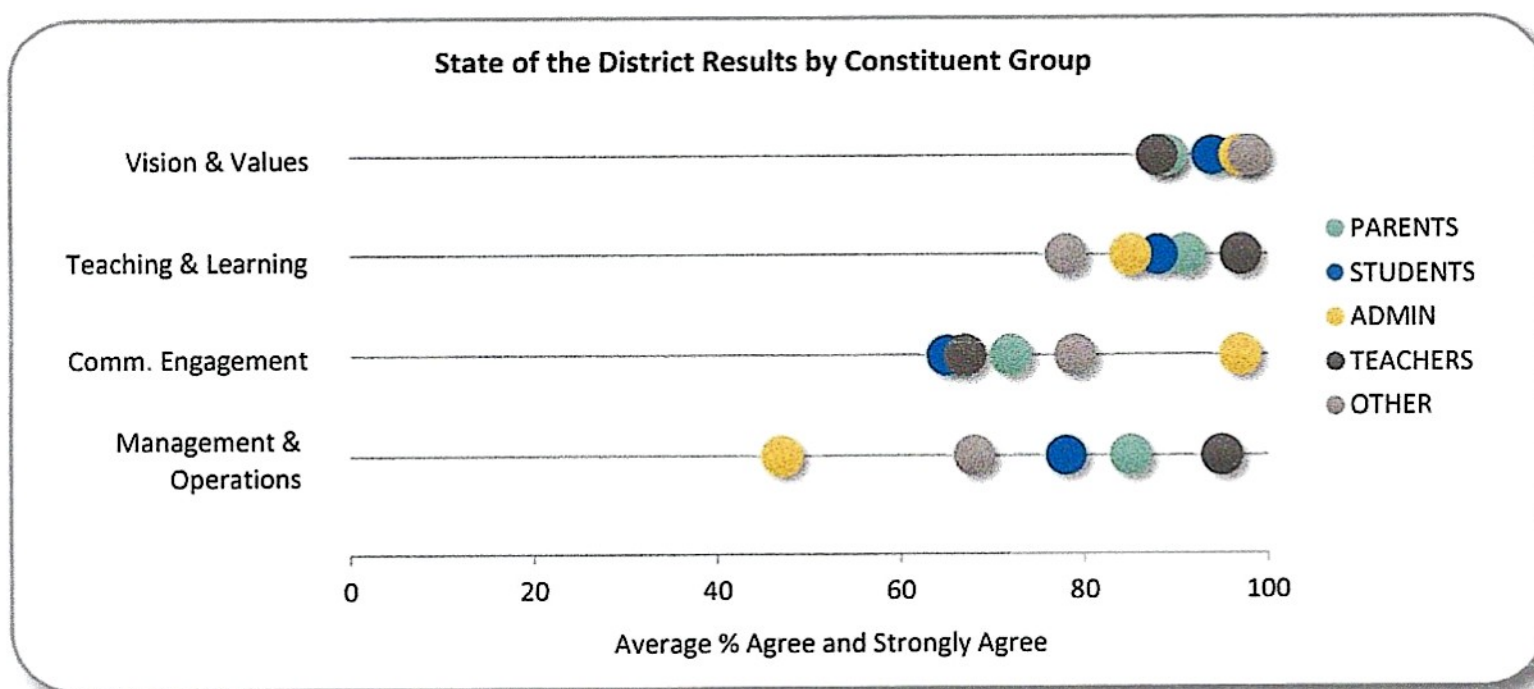
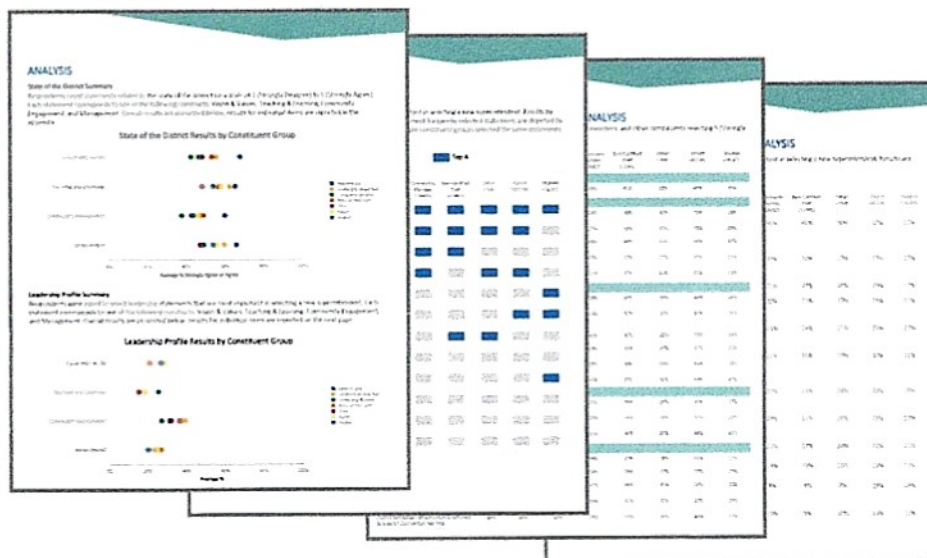
Survey
\$3,000

World Languages
\$550 per Language

Custom Questions
\$1,500 - Up to 10 forced-choice questions and 3 open-ended questions

Full Custom
\$10,000

There is a lot of science involved in crafting a good survey questionnaire. HYA uses a multi-stage process to design, measure change over time, and report survey findings. The Community and Leadership Profile Report is a sophisticated executive report to publish for your community. Survey responses are summarized by area, constituent group, and disaggregated at the question level.



ADVERTISING SERVICES

HYA Associates work with their clients to consider the many approaches to advertising vacant position(s). The Associates create and coordinate all advertisements at the Board's direction.

HYA's advertising packages ensure exposure on the most frequently viewed websites and job boards, e-publications and newsletters of education leaders across the country. In addition, HYA offers more focused advertisement packages as add-ons to the national packages below, including state and region-specific options.

All search clients are advertised on the HYA's active searches page. The active searches webpage averages 25,000 views per month and is a clickable list that leads its viewers to a separate page fully dedicated to your search.

Package 1 - AASA

\$3,050

30-day Online Posting on AASA Career Center

Spotlight and Preferred on AASA Career Center, and Featured on AASA's homepage, Career Center, and E-newsletters

Two Single-listings in HYA's Monthly Group Ad

on HYA's Social Media Pages and in Education Week (print)

Social Media Updates

on HYA's Facebook, Instagram, LinkedIn and Twitter

Package 2 - EdWeek

\$3,050

30-day Online Posting on Top School Jobs

Showcased on Education Week's Top School Jobs and Network of Websites, and its Exclusive Leadership E-newsletter

Two Single-listings in HYA's Monthly Group Ad

on HYA's Social Media Pages and in Education Week (print)

Social Media Updates

on HYA's Facebook, Instagram, LinkedIn and Twitter

Package 3 - Comprehensive

\$4,400

30-day Online Posting on AASA Career Center

Spotlight and Preferred on AASA Career Center, and Featured on AASA's homepage, Career Center, and E-newsletters

30-day Online Posting on Top School Jobs

Showcased on Education Week's Top School Jobs and Network of Websites, and its Exclusive Leadership E-newsletter

Two Single-listings in HYA's Monthly Group Ad

on HYA's Social Media Pages and in Education Week (print)

Social Media Updates

on HYA's Facebook, Instagram, LinkedIn and Twitter

ADD-ON & REGIONAL

Regional packages give your vacancy additional exposure in a specific geographic region. National packages should still be considered.

ALAS & NABSE

Add-on
\$850

ALAS

6-week Online Posting

NABSE

30-day Online Posting

California

\$2,200

EdCal's CareerConnect (2x)

Classified Job Listing

ACSA Career Center (2x)

7-day Online Posting

CALSA

30-day Online Posting

HYA's Monthly Group Ad

One listing

Social Media Updates

Northeast

Add-on
\$1,095

NJASA

30-day Online Posting

NYSCOSS

45-day Online Posting

CAPSS

6-week Online Posting

Print Ad

Add-on
\$3,050

Dedicated District specific
ad in Ed Week's print
publication



Social Media Updates

Custom Quoted Pricing

Based on the number
of Associations and
frequency of ads to
place.

Group Ad \$720

HYA's Monthly Group Ad
One listing



JOB LISTING

1

2



Executive Due Diligence

HYA offers executive due diligence as part of the search process that are completed by independent third-party investigators. The investigative procedures are comprehensive and thorough with a focus on the public school landscape - well beyond what constituents will produce through a simple internet search. The executive due diligence includes on-site research of primary source documents at relevant county court houses for criminal record history. Each background search requires 7-10 working days to complete.

Two packages are offered: comprehensive and standard. The Comprehensive Package includes a news and social media analysis. The news media investigation provides a better understanding of a candidate's leadership style, public relations skills and priorities. The news media investigation draws upon over 28,000 specialized publications and 900 newswires in 200 countries and includes 30 years of credible archived information. Special focus is given to publications in communities where the candidate has lived or worked. The social media review includes a review of text and images on sites such as Twitter, LinkedIn, personal blogs and industry websites. The analysis provides a summary of candidate generated activity with highlights of negative alerts.

The Standard Package was designed in response to requests for a simpler cabinet or principal position background check; it does not include the news and social media analysis.

| | Comprehensive
\$1950 | Standard
\$1100 |
|--|-------------------------|--------------------|
| Personal Profile Summary | x | x |
| Social Security Trace | x | x |
| County Criminal Record History | x | x |
| Federal Criminal Record History | x | x |
| County Civil Record History | x | x |
| Department of Motor Vehicles License Information | x | x |
| Education (Degree) Verification | x | x |
| Credit Report | x | x |
| Investigation of all Aliases Identified within Past 7 Years | x | x |
| Investigation of all Jurisdictions of Residence, Education, and Employment within Past 7 Years | x | x |
| University and Academic Program Accreditation | x | x |
| National Criminal Record History | x | x |
| National Sex Offender Search | x | x |
| News Media Review | x | |
| Social Media Review | x | |

HYA Transition Services

HYA offers optional transition services that would benefit the Board and Superintendent. Our website contains even more information, including white papers, brochures and videos about HYA's Transition services.

Visit: <https://hyasearch.com/executive-search/transition/>

Board Governance Workshop

The Board Governance Workshop requires a half day and provides the Board the opportunity to clarify the respective roles of the Board and the Superintendent. The workshop addresses the concepts of trusteeship, governance, management, continuous improvement, and systematic change. Developing and maintaining effective Board-Superintendent relations, the need for long and short range planning, consensus decision-making, and other components of successful Board service are also discussed at this workshop.

\$2,500, includes all preparation and material.

Board Goal Setting & Superintendent Evaluation

To develop and maintain effective Board-Superintendent relations and provide the Board with an opportunity to determine what it desires to have the Superintendent achieve while in the position, goals and the evaluation process must be codified and understood with great clarity. The evaluation process should reinforce the concept of continuous improvement and should monitor the achievement of the Board's goals. Processes and instruments for performance evaluation will be provided.

\$5,000 (2 sessions: 1. Goal setting for superintendent, 2. Facilitation/review of superintendent evaluation).

Executive Coaching

Creating and sustaining powerful Superintendent-Board partnerships is a key component of HYA's Signature Superintendent Coaching program. HYA Associates understand first-hand the demands of the position and are able to come alongside Superintendents as experiences through partners to explore leadership challenges and generate strategies to overcome obstacles before problems arise. The HYA program includes:

- Customized, confidential Executive Coaching sessions offered twice monthly
- Interviews and assessments designed to foster understanding of Superintendent's strengths, areas of growth, successes, and challenges, including:
 - » Strengths Inventories
 - » Emotional Intelligence (EQi2.0) Assessment
- Additional assessment options and 360 survey instruments available for Superintendent use
- Integration of additional HYA Associates with content-specific expertise available as needed throughout coaching experience
- 24/7 On-demand access for emergency situations

\$10,000/yearly subscription

Transition Dashboard

Performance during the transition period in a new district is critical; it is an opportunity for the Superintendent to build relationships, analyze student achievement and financial status, understand community expectations and values, and arrive at a set of performance indicators to measure district success. Actions by the leader during the transition period form the foundation upon which all future rests. A solid foundation promotes future accomplishments. The Transition Dashboard provides a framework for the Superintendent to align communication and define school quality based on the priorities of the Board and community stakeholders.

The Transition Dashboard includes:

- An online, dynamic, and transparent infrastructure for the new Superintendent to communicate what they learned throughout the search process
- Key performance indicators that represent the values and priorities of the school district
- Specific actions the superintendent will do during the transition period

\$10,000/year hosting fee

HYA looks forward to the possibility of working with the Board and assisting with the selection of a new leader. Please contact HYA at 847.250.7261 or at hya@hyasearch.com with questions or requests for additional information.

Hazard, Young, Attea & Associates
909 W. Euclid Ave.
#926
Arlington Heights, IL 60006

www.hyasearch.com

**PROPOSAL TO
SUDBURY PUBLIC SCHOOLS
FOR
SUPERINTENDENT SEARCH SERVICES**

TECHNICAL PROPOSAL

RFP #27-001

New England School Development Council
28 Lord Road
Marlborough, MA 01752
www.nesdec.org

LETTER OF INTRODUCTION

September 4, 2026

Sudbury Public Schools
Business Office
40 Fairbank Road
Sudbury, MA 01776

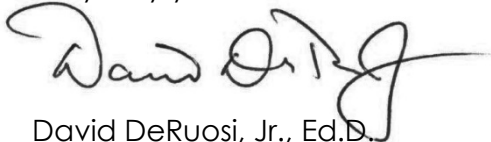
Dear Members of the Sudbury School Committee:

The New England School Development Council (NESDEC) is pleased to submit this proposal to Sudbury Public Schools describing the services we would provide in a superintendent search. As a NESDEC affiliate, Sudbury is entitled to a **20% discount** on our search services. This discount is reflected in our Cost Proposal.

The enclosed proposal outlines our search process. I hope this information will give you an idea of the scope and breadth of a **NESDEC Search**. As you review our proposal, you will note that some items may require greater specification after the search begins, e.g., where to advertise, the number of initial interviews or finalists. These specifications would be made through discussion with and approval of the School Committee.

We are committed to an effective search process that will provide Sudbury with a Superintendent who will meet the needs and expectations of the School Committee and the community. We thank you for considering NESDEC to assist in your district's upcoming search.

Very truly yours,

A handwritten signature in black ink, appearing to read "David DeRuosi, Jr.", with a stylized flourish at the end.

David DeRuosi, Jr., Ed.D.
Executive Director

ABOUT NESDEC

WHY NESDEC?

Originally established at the Harvard Graduate School of Education, NESDEC, now a stand-alone, not-for-profit corporation, has been serving New England school districts since 1946. NESDEC's Executive Search Program was started with the specific objective of broadening the base of highly talented candidates available to school systems when they need to fill an administrative vacancy. Since the inception of the program, we have conducted well over six hundred successful executive searches throughout New England. Each NESDEC executive search is designed around the client's specific needs and expectations.

THE NESDEC DIFFERENCE

In deciding who might best provide assistance to your district, we hope you would consider that NESDEC is a comprehensive educational organization. We do much more than **Executive Searches**. NESDEC's **Professional Development** offerings attract many educators annually; our **Planning** work includes enrollment projections for over 300 school districts as well as many other facility, staffing and specialized studies across New England; and our **Research and Development** efforts have resulted in several national publications on the topic of improving student achievement.

NESDEC distinguishes itself in another important way. Headquartered in New England since 1946, NESDEC has gained a deep understanding of the advantages, challenges, and cultural demands associated with being an educational leader in the region. In addition, as a result of NESDEC's longtime association with the National School Development Council (NSDC), the firm has a well-developed capacity to network, recruit and attract talented applicants on a nationwide basis.

OVERVIEW OF NESDEC'S SEARCH ASSISTANCE

NESDEC's search assistance includes several components designed to attract well-qualified candidates.

- An announcement process, which includes print and electronic communication with our exclusive regional and national networks.
- A thorough understanding of the needs of the community and the qualities that the new leader should possess, as reinforced by focus group data and survey findings.
- An active regional and national recruitment component designed to provide high-performing candidates.
- A consultant supported by a region-wide search staff with direct experience as Superintendents of Schools.
- A formal follow-up process, which includes an Entry Planning consultation for the new Superintendent, and the options of a fee-based Superintendent/School Committee retreat and/or Executive Coaching support for the new Superintendent.

APPROACH AND PLAN

The Scope of Services would be provided by Dr. Carolyn Burke, Senior NESDEC Search Consultant. A resume and brief biography accompany this proposal.

DEVELOP A SCHEDULE FOR THE SUPERINTENDENT SEARCH

Before initiating an executive search, NESDEC recommends meeting with the School Committee to ensure that all the elements of the search expected by the Committee are included and that the timeline is constructed so as to accommodate the agreed-upon search activities. The NESDEC consultant would confer with the School Committee to develop an event schedule/timeline for the entire process. The schedule would detail the major tasks in the search process and delineate the respective responsibilities of the consultant and the School Committee.

Please Note: In addition to being held in-person, meetings arranged for this executive search may be conducted via videoconference or telephone conference call if deemed advisable by the parties.

PUBLICIZE VACANCY: ADVERTISING AND ELECTRONIC OUTREACH

NESDEC begins by preparing a customized application form which would include a permission statement for release and verification of records. The application is hosted on the NESDEC website, www.nesdec.org and is advertised there as well.

NESDEC has a well-developed outreach network both in Massachusetts and throughout the New England states. In our outreach, we focus on potential applicants who likely possess the qualities, characteristics, skills, knowledge, and experiences preferred for a particular position.

NESDEC would draft a personalized informational letter (one page) describing the position, the school district, and the community. The School Committee and/or a representative would provide the input for the letter and would approve the final copy. NESDEC distributes the informational letter announcing the vacancy and requesting nominations, to the NESDEC Recruiting Network, including:

- Superintendents, assistant superintendents and job-related personnel in Massachusetts
- Member communities of the New England School Development Council
- Superintendents, assistant superintendents, and job-related personnel in selected school districts throughout New England, New York, New Jersey and Pennsylvania with characteristics similar to Sudbury



Using the informational letter as a model, NESDEC develops an electronic advertisement and distributes it on the following job boards (unless noted below, all electronic advertising is included in the professional fee charged to the district for the search):

- **SchoolSpring:** online, national advertisement, 30 days
- **Top School Jobs** (the online advertising service of *Education Week*): national advertisement, 30 days
- **American Association of School Administrators** (AASA) website **Job Bulletin:** online, national announcement, 30 days
- School Leadership 2.0 (SL20) website **School Leadership Jobs:** online, regional announcement, 40 days
- NESDEC routinely posts vacancies on targeted diversity websites, including: the **NABSE** (National Alliance of Black School Educators) **Career Center** and **ALAS** (Association of Latino Administrators and Superintendents)
- NESDEC would place announcements in assorted superintendent/school board association websites
- NESDEC would discuss with the School Committee options for fee-based advertising of the vacancy in other selected venues

NESDEC prepares a customized email blast campaign of the vacancy and sends it at strategic points in the recruitment process to:

- member communities of the New England School Development Council
- superintendents, assistant superintendents, and job-related personnel in Massachusetts
- selected New England, New York, New Jersey and Pennsylvania superintendents and job-related personnel in school districts with similar characteristics to Sudbury
- Executive Directors of study councils affiliated with the National School Development Council (NSDC)
- Placement offices of colleges and universities throughout the nation that prepare school administrators
- Selected educational leadership professors throughout New England
- Other colleges and institutions as suggested by the School Committee
- Officers of the Suburban School Superintendents (National)
- Selected Executive Directors of state superintendent and school board associations in the United States

If requested, NESDEC can prepare newspaper copy for use in advertisements as directed by the School Committee. This is available as a fee-based service; please see our cost proposal.

REGIONAL AND NATIONAL RECRUITMENT OF CANDIDATES

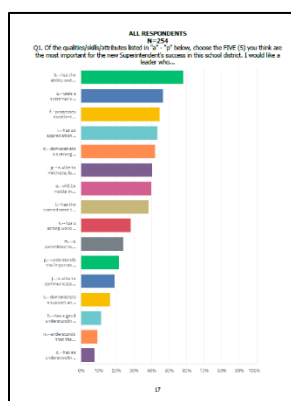
Using its proprietary network, NESDEC recruits at the state, regional and national levels. Although NESDEC is a nationally recognized search firm, our national reach is further enhanced through our association with the National School Development Council (NSDC).

NESDEC actively recruits candidates for the position from its network of educational leaders representing school study councils nationwide, urban and suburban school superintendents, professors of educational administration and national professional associations.

DEVELOP A SUCCESSFUL CANDIDATE PROFILE

Community Needs Assessment: NESDEC meets with the School Committee to develop a plan for assessing the needs of the school system as seen by a cross-section of staff, students, parents, and other community members.

The consultant would conduct up to four focus groups with school/community representatives (combination of virtual and in-person) to receive their input regarding the new Superintendent. The focus groups would be scheduled as mutually agreed by the NESDEC consultant and the School Committee. If requested by the School Committee, the focus groups would be augmented through telephone/videoconference interviews of selected officials, educational leaders, citizens, and others in the community. (Please see our Cost Proposal for the option of additional focus groups.)



If requested by the School Committee, NESDEC, using its proprietary web-based Community Input Questionnaire, would seek the views of school district and community stakeholders/representatives regarding the characteristics and competencies desired in the new Superintendent.

Analyze Data: Incorporating the input provided through the focus groups, interviews and electronic survey, the consultant would conduct a facilitated conversation with the School Committee to discuss the qualities sought in the new Superintendent and the priorities for his/her/their attention once appointed. The results of the facilitated conversation would be developed into a *Successful Candidate Profile* and criteria to be used as applications are screened and candidates interviewed.

ASSIST IN SCREENING APPLICATIONS

The consultant would develop with the School Committee a process for the screening of candidates. Since there are several alternatives, the process can be tailored to meet the needs of the School Committee. If a Screening Committee is to be used, NESDEC would suggest various models and membership for the Committee.

ASSIST IN INTERVIEWS OF CANDIDATES

The consultant would conduct a workshop with the School Committee/Screening Committee to assist them in the interviewing and selection process. The consultant assists in the preparation of questions, in the development of rating scales, and in the planning of interviewing techniques.

NESDEC arranges the interview schedules and provides the Screening Committee with secure access to the dossier on each of the candidates via NESDEC's proprietary executive search website.

During the interview workshop, NESDEC would discuss with the School Committee/Screening Committee the role of the consultant during the preliminary interview phase of the search. Although the consultant would not attend the interviews, she would be available to debrief with the School Committee/Screening Committee and the

candidates after each round of interviews. The consultant can assist throughout the interview process, as requested.

Once the Screening Committee has determined the finalists, NESDEC conducts credential verification and additional reference checks and supports members of the School Committee in making independent reference checks. If requested, NESDEC would assist with arrangements for School Committee members to communicate with representatives of the finalists' present school districts or institutions.

NESDEC assists with arrangements for finalists' interviews and in developing further interactions/exchanges with the school district and the communities. The consultant would also be available to facilitate a meeting of the School Committee after the finalists' interviews, if requested. NESDEC would assist the School Committee in the final selection process, including the development of an "Agreement in Principle" with each of the finalists to discuss the terms and conditions of an offer before the selection.

ADMINISTER ALL SEARCH DETAILS

During the application process, NESDEC responds to questions from interested candidates and directs them to the online application.

NESDEC receives all applications at its headquarters and create/maintain candidate files. Upon receipt, NESDEC would check all applications to determine they are complete, and if not complete, follow up with the potential candidate so that all material might be received by the closing date.

NESDEC communicates with unsuccessful candidates at appropriate stages during the search process. Once the School Committee has selected the new Superintendent, NESDEC would inform the unsuccessful candidates and other groups in our network about the School Committee's choice.

MAINTAIN ON-GOING COMMUNICATION WITH THE SCHOOL COMMITTEE

NESDEC's intent is to keep the School Committee informed about what is occurring at each stage of the search process, so that you will have the tools you need to communicate with your constituents. The consultant confers with the School Committee/Screening Committee as needed throughout the search. Status updates are given regularly by telephone, text, email and/or videoconference, with the consultant providing progress reports to the Chairperson and/or the designated liaison.

FOLLOW-UP

Once the successful candidate is chosen, NESDEC invites the new Superintendent to confer with one of our consultants to discuss the transition process particularly as it relates to his/her/their Entry Plan. NESDEC can assist with initial contract arrangements between the new Superintendent and the School Committee, if requested.

SEARCH DESIGN FLEXIBILITY

Please note: NESDEC has the capacity to design a search around the School Committee's specific needs in order to accommodate such things as: desired timeline, degree of community involvement, and/or cost.

LANGUAGE TRANSLATION SERVICES

Please note: This proposal does not include language translation services of any kind. It is assumed that this type of assistance would be the responsibility of the District/ municipality.

However, if language translation services are required, NESDEC can coordinate with the local district-assigned translator to ensure the inclusion of members of the community in need of this service.

WARRANTY

The search would be deemed completed upon the appointment of the new Superintendent to the position. If, after due consideration, the School Committee determines that it does not wish to appoint any of the candidates who have applied for the position, NESDEC would conduct a follow-up search for the same position and would provide consulting and support services at no cost except for advertising and search related expenses. (Fixed search-related expenses are noted in the Cost Proposal.)

If a candidate chosen as the result of a NESDEC executive search should leave the position either voluntarily or involuntarily for any reason other than retirement or a transfer/appointment in the school system or transfer/appointment to a position in the municipalities within an eighteen-month period of the employment start date, NESDEC would provide free of charge consulting and support services comparable to those of the initial search, on a one-time basis, exclusive of advertising and related expenses, to conduct a new search for the same position. (Fixed search-related expenses are noted in the Cost Proposal.)

NESDEC AFFILIATION

Sudbury Public Schools is a NESDEC affiliate and, therefore, entitled to a 20% discount on our consulting fee.

NESDEC EXECUTIVE SEARCH PERSONNEL

Carolyn J. Burke, Ed.D.

Senior Staff Associate, Planning and Executive Search

Dr. Carolyn Burke has been a public school educator for over thirty-five years. She received a Bachelor of Science degree in elementary education from Boston State College, a Master's degree in special education and a Master's degree in administration from the University of Massachusetts, Boston. She earned a Doctorate from Boston University in Policy, Planning and Administration. Dr. Burke worked as a school principal for over 18 years and as an assistant principal, head teacher and teacher of all grades 1-6, including special education inclusion and grade six math/science. She served as the Associate Program Director for the Rural Small Schools Network at NESDEC, adjunct faculty at Salem (MA) State College, Graduate School of Education, and most recently, as a senior instructor in the Department of Educational Leadership at Cambridge College, Cambridge, MA. Dr. Burke has conducted numerous NESDEC executive searches in New England.

David DeRuosi, Ed.D.

Executive Director

David DeRuosi holds a Bachelor of Science degree in Speech and Hearing from Northeastern University, a master's degree in School Administration from Salem State University, and a doctorate in Urban Leadership from the University of Massachusetts Boston. Prior to his work with NESDEC, Dr. DeRuosi spent 34 years in the field of education. Dr. DeRuosi began his career as a moderate special needs teacher in Winthrop, MA, then moved on to Salem, MA where he taught a behavioral self-contained classroom and worked with the Massachusetts District Attorney's Office to start a conflict resolution program in the Salem Public Schools. His move into administration began by serving as Vice Principal in the cities of Chelsea and Revere, Principal of Revere High School, and as Assistant Superintendent of Pupil Personnel Services in Revere Public Schools. He then served as Superintendent of Schools in both Malden and Saugus, MA, and most recently as Interim Superintendent in the Raymond School District (SAU #33) in New Hampshire. In addition to his role as superintendent, Dr. DeRuosi has been a presenter at conferences on topics ranging from conflict resolution, negotiations, and trauma's impact on students, to leadership and creating and sustaining change.

CAROLYN J. BURKE, Ed.D.
48 Marathon Street
Arlington, MA 02474

EDUCATION:

Doctorate

Boston University, Boston, MA
Policy, Planning and Administration

Master of Science

University of Massachusetts, Boston, MA
Education/Administration

Master of Science

University of Massachusetts, Boston, MA
Special Education

Bachelor of Science

Boston State College, Boston, MA
Elementary Education

**PROFESSIONAL
EXPERIENCE:**

Staff Associate

New England School Development Council (NESDEC)
Marlborough, MA

Senior Instructor: Department of Educational Leadership

Cambridge College, Cambridge, MA

Principal

Hemenway School
Framingham, MA

Associate Program Director, Small Schools Network

New England School Development Council
Marlborough, MA

Adjunct Faculty, Graduate School of Education

Salem State College
Salem, MA

Administrative Intern

Assistant Principal/Head Teacher, South School

Teacher (all grades 1-6)

Stoneham Public Schools
Stoneham, MA

DAVID DERUOSI, Jr., Ed.D.
16 Seabrook Road
Salisbury, MA 01952

EDUCATION:

Doctor of Education

University of Massachusetts Boston, MA
Leadership in Urban Schools

Master of Education

Salem State College, MA
School Administration

Bachelor of Science

Northeastern University, MA
Speech and Hearing

**PROFESSIONAL
EXPERIENCE:**

Executive Director

Associate Director

New England School Development Council

Interim Superintendent of Schools

Raymond School District (SAU #33)
Raymond, NH

Superintendent of Schools

Saugus Public Schools
Saugus, MA

Superintendent of Schools

Malden Public Schools
Malden, MA

Assistant Superintendent of Pupil Personnel Services

Principal, Revere High School

Assistant Principal, Beachmont School

Assistant Principal, Garfield School

Revere Public Schools
Revere, MA

Assistant Principal, Williams Middle School

Chelsea Public Schools
Chelsea, MA

Conflict Intervention Coordinator, Collins Middle School

Special Education Teacher, Middle School West

Salem Public Schools
Salem, MA

Special Education Teacher, Winthrop Middle School

Winthrop Public Schools
Winthrop, MA

A PARTIAL LIST OF RECENT NEW ENGLAND SEARCHES CONDUCTED BY NESDEC

ACTON-BOXBOROUGH RSD, MA – SUPERINTENDENT

16 Charter Road 978-264-4700
Acton, MA 01720
Diane Baum, School Committee and Chair of Screening Committee

AMESBURY, MA – SUPERINTENDENT

5 Highland Street 978-388-0507
Amesbury, MA 01913
Mayor Kassandra Gove, Chair, School Committee

ANDOVER, MA – SUPERINTENDENT

30 Whittier Court 978-247-7000
Andover, MA 01810
Shauna Murray, Chair, School Committee

BARRE UNIFIED UNION SCHOOL DISTRICT, VT – SUPERINTENDENT

120 Ayers Street 802-476-5011
Barre, VT 05641
Garrett Grant, School Board

BOLTON, CT – SUPERINTENDENT

72 Brandy Street 860-643-1569
Bolton, CT 06043
Andrew Broneill, Chair, Board of Education

DEDHAM, MA – SUPERINTENDENT

100 Whiting Avenue 781-310-1000
Dedham, MA 02026
Mayanne Briggs, School Committee 617-969-6200 x251

DIGHTON-REHOBOTH REGIONAL SCHOOL DISTRICT, MA – SUPERINTENDENT

2700 Regional Road 508-252-5000
North Dighton, MA 02764
Aaron Morse, School Committee

EAST GREENWICH, RI – SUPERINTENDENT

111 Peirce Street 401-398-1200
East Greenwich, RI 02818
Alyson Powell, Chair, School Committee

FALMOUTH, ME – SUPERINTENDENT

51 Woodville Road 207-781-3200
Falmouth, ME 04105
Alicia Johnson, Chair, School Board

GREENFIELD, MA – SUPERINTENDENT

195 Federal Street, Suite 100
Greenfield, MA 01301
Stacey Sexton, Chair, School Committee

413-772-1300

HEBRON, CT – SUPERINTENDENT

580 Gilead Street
Hebron, CT 06248
Heather Petit, Chair, Board of Education

860-228-2577

HUDSON, MA – SUPERINTENDENT

155 Apsley Street
Hudson, MA 01749
Steven Smith, Chair, School Committee

978-567-6100

HULL, MA – SUPERINTENDENT

18 Harborview Road
Hull, MA 02045
Kyle Conley, Chair of the Search/Interviewing Committee

781-925-4400

MIDDLETOWN, CT – SUPERINTENDENT

311 Hunting Hill Avenue
Middletown, CT 06457
Sheila Daniels, Chair, Board of Education

860-638-1401

MIDDLETOWN, RI - SUPERINTENDENT

26 Oliphant Lane
Middletown, RI 02842
Gregory Huet and Theresa Spengler, School Committee

401-849-2122

NAUGATUCK, CT – SUPERINTENDENT

497 Rubber Avenue
Naugatuck, CT 06770
Bob Mezzo, Chair, Board of Education

203-720-5265

REGION 12, CT – SUPERINTENDENT

11A School Street
Washington, CT 06793
Jennifer Pote, Board of Education

860-868-6100

RSU #21, ME – SUPERINTENDENT

177 Alewife Road Phone
Kennebunk, ME 04043
Matt Stratford, Chair, School Board

207-985-1100

SHREWSBURY, MA – SUPERINTENDENT

100 Maple Avenue
Shrewsbury, MA 01545
Rachel Sharifipour, Chair, School Committee

508-841-8400

SOUTH KINGSTOWN, RI – SUPERINTENDENT

307 Curtis Corner Road
Wakefield, RI 02879
Carol Vetter, School Committee

401-360-1300

STONEHAM, MA – SUPERINTENDENT

149 Franklin Street
Stoneham, MA 02180
Nicole Nial, School Committee

781-279-3802

SUFFIELD, CT – SUPERINTENDENT

350 Mountain Road
Suffield, CT 06078
Maureen Sattan, Chair, Board of Education

860-668-3800

TIVERTON, RI – SUPERINTENDENT

100 North Brayton Road
Tiverton, RI 02878
Diane Farnworth, Chair, School Committee

401-624-8475

TWO RIVERS SUPERVISORY UNION, VT – SUPERINTENDENT

609 VT Route 103 South
Ludlow, VT 05149
Paul Orzechowski, School Board Chair

802-875-3365

UXBRIDGE, MA – SUPERINTENDENT

9 North Main Street
Uxbridge, MA 01569
Christine Pezzullo, Chair, School Committee

508-278-8648

VERNON, CT – SUPERINTENDENT

30 Park Street
Vernon, CT 06066
Paul Grabowski, Chair, Board of Education

860-870-6000

WOODBIDGE, CT – SUPERINTENDENT

40 Beecher Road – South
Woodbridge, CT 06525
Lynn Piascyk, Chair, Board of Education

203-387-6631

Attachment C

CERTIFICATION OF GOOD FAITH & NON-COLLUSION

The undersigned certifies under pains and penalties of perjury that this bid 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.

CERTIFICATE OF STATE TAX COMPLIANCE

Pursuant to M.G.L. c.62C, §49A, the undersigned acting on behalf of the Contractor, certifies under the penalties of perjury that, to the best of the undersigned's knowledge and belief, the Contractor is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.*

David DeRuosi, Jr.

** Signature of authorized individual submitting bid/proposal

Printed Name David DrRuosi, Jr.

date September 4, 2026

Name of Business (if applicable) NESDEC

*** Social Security or Federal Tax Identification Number 04-2104762

* The provision in the Attestation relating to child support applies only when the Contractor is an individual.

** Approval of a contract or other agreement will not be granted unless the applicant signs this certification clause.

***Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of M.G.L. c.62C, §49A.

REFERENCES FORM

***** You may use your own reference form(s) if they provide the same information. *****

Please see pages 11-13 of our technical proposal

Proposer's Name: _____

Proposer must provide references for similar type projects performed within the past five years.

Attach additional pages if necessary.

Reference: _____ Contact: _____ Phone: _____

Address: _____

_____ Fax: _____

Description and date of Project: _____

Reference: _____ Contact: _____ Phone: _____

Address: _____

_____ Fax: _____

Description and date of Project: _____

Reference: _____ Contact: _____ Phone: _____

Address: _____

_____ Fax: _____

Description and date of Project: _____

Reference: _____ Contact: _____ Phone: _____

Address: _____

_____ Fax: _____

Description and date of Project: _____

SIGNATURES

(IF AN INDIVIDUAL)

Date _____, 2026

Signature of Proposer (SEAL) (Owner and Proprietor)

Business Name D/B/A _____

Business Address

-- (IF A CO-PARTNERSHIP)

Date _____, 2026

Firm Name _____

_____(SEAL)

By _____(SEAL)

Business Address

Names and Addresses _____

of all

Members of Firm

-- (IF A CORPORATION)

Date September 4, 2026, 2026

Corporate Name NESDEC

By David DeRuosi, Jr., Executive Director
President or Authorized Agent*

David DeRuosi, Jr.

Business Address 28 Lord Road, Marlborough, MA 01752

*Statement of authorization, duly signed by proper authority, to be attached hereto.

RFP issued August 19, 2026 at 40 Fairbank Road, Sudbury, MA

~~~~~•~~~~~

**nothing follows**



The background of the top half of the page features a large, light green watermark of the Nesdec logo. The logo consists of the word "NESDEC" in a bold, sans-serif font, with a stylized graphic element to its right that resembles a large, bold letter "N" or a series of overlapping geometric shapes. The watermark is semi-transparent and covers the upper portion of the page.

**PROPOSAL TO  
SUDBURY PUBLIC SCHOOLS  
FOR  
SUPERINTENDENT SEARCH SERVICES**

**COST PROPOSAL**

**RFP #27-001**

New England School Development Council  
28 Lord Road  
Marlborough, MA 01752  
[www.nesdec.org](http://www.nesdec.org)

# COST PROPOSAL

## FEES AND EXPENSES

### Professional Consulting Fee

The professional consulting fee includes not only the services specifically described in our Technical Proposal, but also the secretarial and clerical services performed at the NESDEC office. Our professional fee to Sudbury Public Schools for an Executive Search as described in this proposal would be:

**Fixed Consulting Fee: \$11,600 (\$14,500 less the 20% NESDEC affiliate discount of \$2,900)**

### Search Related Expenses

Search related expenses, which must be borne by the School Committee include: printing, photocopying, telephone, postage, consultant travel expenses and consumable supplies. The fixed cost of these expenses would be:

**Fixed Expenses: \$2,160**

## TOTAL COST OF SEARCH

|                      |                 |
|----------------------|-----------------|
| Fixed Consulting Fee | \$11,600        |
| Fixed Expenses       | \$2,160         |
| <b>TOTAL</b>         | <b>\$13,760</b> |

Please note: This quote includes all electronic advertising and recruitment outreach as detailed in this proposal.

*This price quote will remain in effect through December 1, 2026.*

## INVOICING SCHEDULE

One-half of the fixed consulting fee, \$5,800, would be due and payable within 15 days of the signing of the agreement. One-half of the fixed consulting fee, \$5,800, would be due and payable within 30 days of the presentation of the dossiers.

Search-related expenses of \$2,160 described above would be billed in four monthly installments of \$540.

## **ADDITIONAL FEE-BASED OPTIONS**

In addition to the services detailed in this search proposal, NESDEC has the capacity to offer supplementary fee-based options at discounted rates, if purchased as part of the search. (If these options are purchased independently of the search, the discounted rates quoted below do not apply.)

### **Community Focus Groups**

Focus groups beyond those detailed in the proposal can be arranged.

*Additional cost: \$425 per group*

### **Entry Planning Consultation**

NESDEC would invite the new Superintendent to confer with one of our consultants to discuss the transition process particularly as it relates to his/her/their Entry Plan.

*Additional cost: Quote furnished upon request*

### **Team/Governance Retreat and Follow-up**

The search consultant or one of NESDEC's team-building consultants would conduct a half-day workshop with the new Superintendent and the School Committee. The goal of the workshop and follow-up would be to build the foundation for an effective and collaborative approach to school district governance.

*Additional cost: \$1,250*

### **Long-term Executive Coaching**

NESDEC has the capacity to provide sustained coaching services for the new Superintendent. These fee-based services vary in length and are tailored to meet the needs of the new Superintendent and the district.

*Additional cost: Quote furnished upon request*

### **Fee-Based Hardcopy Advertising**

NESDEC would place a hardcopy advertisement in *Education Week*, which would run for one week.

*Additional cost: Quote furnished upon request; billed at cost*



## Price Proposal

**(To be submitted as separate PDF file or in a separate sealed envelope from the Technical Proposal)**

The price proposal (one original copy) must be submitted without “conditions or exceptions” and must be submitted under separate cover and in a sealed envelope.

The price proposal set forth in this proposal shall constitute full and complete compensation for the services to be provided by the Consultant/Firm. There shall be no reimbursement for out-of-pocket or other expenses incurred by the Consultant in connection with the performance of the services. Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the Proposer. Any exceptions may result in the rejection of the proposal.

### **Price Proposal for Sudbury Public Schools Superintendent Search:**

\$ 13,760 Total Fixed Fee Contract

Price Total Fixed Fee Contract Price in words:

Thirteen thousand, seven hundred sixty dollars

**The Price Proposal must include a rate schedule for the Lead Consultant or other relevant personnel for possible services to be added outside the Scope of Work. Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the Consultant.**

Signature: David DeRuosi, Jr. Date: September 4, 2026

Title: Executive Director

Company: NESDEC Tel: 508-481-9444

Address: 28 Lord Road

City: Marlborough State: MA Zip: 01752

Email: search@nesdec.org

Superintendent Search Information  
~~And Cost Proposal~~  
and  
Alternative – No Cost Services

Submitted by

Massachusetts Association of School  
Committees

## INTRODUCTION

This is the response to the invitation to present a proposal to the School Committee for consulting services for a superintendent search.

Please note that MASC welcomes the opportunity to provide the School Committee with a presentation on the overall scope of issues related to a superintendent search and respond to the School Committee's questions in order to prepare for the process.

In addition, should the School Committee elect to conduct its own search, MASC also provides extensive and invaluable services to our member school districts without any fee, helping to ensure a complete, competent, and successful search.

## MASSACHUSETTS ASSOCIATION OF SCHOOL COMMITTEES

The Massachusetts Association of School Committees (MASC) submits this proposal. MASC is located at One McKinley Square, Boston, MA 02109. For the purposes of this proposal, the lead search consultants will be MASC Field Director Alicia Mallon assisted by MASC Executive Director Glenn Koocher. They will personally manage all aspects of the search process and will, subject to unavoidable schedule conflicts, be present during the meetings, interviews, and all other sessions related to the search. In addition, they will be available to the school committee or search committee at any time.

### MASC SUPERINTENDENT SEARCH CONSULTANT TEAM

Glenn Koocher, Executive Director

Cell phone: 617-733-0497

Email: [glkoocher@masc.org](mailto:glkoocher@masc.org)

As Executive Director, Glenn supervises all superintendent searches and will frequently assist the Field Director when conducting community/school district focus groups. Prior to joining MASC in July 2000, Glenn served as the Northeast US Regional Manager for Programs and Advocacy for the American Association of Retired Persons. A native of Cambridge, MA, he served on the Cambridge School Committee for 12 years.

Alicia Mallon, Field Director/Search Consultant

Cell phone: 978-729-1117

Email: [amallon@masc.org](mailto:amallon@masc.org)

A School Committee member since 2017, Alicia Mallon currently serves on the Nashoba Valley Technical High School Committee. A member of staff since 2023, Ms. Mallon has worked on directly and provided technical assistance to multiple successful searches as both staff and as a committee member, and recently completed searches in Wilmington, Gloucester, Beverly, Lunenburg, and Littleton.

Sean Costello, Field Director/Search Consultant

Cell phone: 781-799-1817

Email: [scostello@masc.org](mailto:scostello@masc.org)

Mr. Costello is a ten year member of the Marshfield School Committee, including nine years as chair. Sean worked for more than ten years at the Massachusetts State House as a Legislative Director and Staff Director in the House of Representatives. He holds a credential in Public Leadership from the Harvard Kennedy School of Government. Sean has recently completed searches in Braintree, Mansfield, and the Norfolk County Agricultural School.



Liz Lafond, Field Director/Search Consultant

Cell phone: 413-250-1506

Email: [llafond@masc.org](mailto:llafond@masc.org)

A current member of the Granby School Committee, as well as a former member of the Hatfield School Committee and Hampshire Educational Collaborative Board of Directors, Liz has been a member of the MASC staff since 2015 and has assisted in over a dozen superintendent searches. She was one of the founding members of MASC's District Governance Support Project, and is a Life Member of MASC.

Tracy Novick, Field Director/Search Consultant

Cell phone: 508-579-5472

Email: [tnovick@masc.org](mailto:tnovick@masc.org)

A former member of the Worcester School Committee, Tracy joined the MASC staff in 2016. In addition to managing MASC's social media presence, Tracy also focuses on school finance issues and holds a MA state certification as a school business administrator. She has been the consultant on a number of superintendent searches in central Massachusetts.

Ann-marie Martin, Superintendent Search Coordinator

MASC office: 617-523-8454

Email: [amartin@masc.org](mailto:amartin@masc.org)

Ann-marie Martin will be among the first contacts your applicants will have with MASC. As the administrative staff person responsible for managing the flow of information, mailings, tracking candidate applications, and following up on search details, she is MASC's principal in-house search coordinator and coordinates the production of MASC's school district Policy Manuals. Ann-marie served for six years on the King Philip Regional School Committee, including four years as chair.

Jenifer Handy, Communications Director

MASC office: 617-523-8454

Email: [jhandy@masc.org](mailto:jhandy@masc.org)

A member of the MASC staff for over 20 years, Jenifer directs all communications and publication operations. She is directly accessible to searching districts for developing print materials, including brochures, advertising copy, and news releases and collaborates on strategies for media to promote superintendent searches.

Kari MacCormack, Graphic Designer

MASC office: 617-523-8454

Email: [kmaccormack@masc.org](mailto:kmaccormack@masc.org)

Kari MacCormack has been MASC's graphic designer for over 10 years. She is responsible for the design of all MASC publications and printed materials for superintendent searches.

All MASC Field Staff can be reached through the Boston Office or via cell phone. The MASC web site provides an updated list of all staff cell phone contact numbers should you wish to contact them at any time. MASC has conducted more than 160 searches over the past two decades.

# **PROPOSAL FOR SUPERINTENDENT SEARCH CONSULTING SERVICES**

## **I. INTRODUCTION**

The Massachusetts Association of School Committees is pleased to have the opportunity to present a proposal for its search services to the School Committee.

The cumulative experience of sixty years served on School Committees by MASC staff together with the expertise of professionals in educational administration will be available to address the needs of your community and your schools as you seek a Superintendent of Schools.

MASC has designed its Search Service to offer maximum flexibility to the Committee and to ensure that the Committee has full management of the decision-making process. MASC does the “legwork” associated with the search so the Superintendent Search Committee and School Committee can concentrate on the most critical steps in the search: interviewing the most qualified applicants and selecting the next Superintendent.

## **II. MASC SEARCH SERVICES**

MASC is prepared to fulfill every requirement specified in the request for proposals, meeting or exceeding all requirements<sup>1</sup>

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- a. Search Committee Orientation. MASC provides an extensive search committee briefing (outline attached).
- b. Focus Groups. MASC, at the discretion of the School Committee, will conduct focus groups at each school level (often at each school), and holds separate meetings with community stakeholders, teachers, administrators, and central office personnel.
- c. In addition to focus groups, we have the electronic survey capacity to identify community issues and priorities.
- d. Focus Group Summaries. MASC will compile focus group or survey report summaries as requested to help School Committee get a good sense of needs, priorities and stakeholder opinion. Samples are available upon request.
- e. Developing Leadership Criteria. MASC works with the School Committee to take the results of the focus group and to meld them with the board’s priorities to develop leadership criteria. MASC is part of the MA DoE Leadership Project and has access to several samples as well.
- f. Profiles and Realistic Candidate Qualifications. MASC has many models and has demonstrated a well-established capability of defining candidate qualifications in collaboration with the School Committee.
- g. Competitive Salary Ranges. MASC provides each member with an up to date statewide salary survey. In addition, we have other resources related to contracting and other compensation benefits.
- h. Recommended Budget. MASC has submitted to the School Committee its comprehensive guide “Looking for a Leader” that gives a full perspective on the search process and potential costs and all aspects of superintendent searching.
- i. Reference Checking. MASC assists districts with reference checks or works with the School Committee to conduct reference checking as directed. We also have resources for reference checking and site visits.
- j. Question Development. MASC shares its resources and guides to question development and has several dozen models of questions from which the search committee or school committee can craft its questions.
- k. Resume Screening. MASC will train the search committee or school committee to screen resumes and assist them in doing so. In addition, we will review and screen candidates and provide a recommended list of initial candidates

Each step of the search process for your next Superintendent must be carefully planned to meet the needs and expectations of the Superintendent Search Committee. Generally, the MASC Search Service consists of the following elements:

#### **A. General Consultation**

During the initial visit with the Superintendent Search Committee, the MASC consultant will discuss options with the Committee and explain the MASC Search Service in detail. Specific items to be covered at that time include:

- A vision of the school committee as it begins its search to set guidelines for all phases of the search, including:
  - Assessment of the search environment.
  - Analysis of the district needs and goals.
- Planning a timetable;
- Defining the scope of the search, superintendent qualifications, community and staff involvement, including use of a Search Committee;
- Requirements of the public records and open meeting statutes;
- Requirements for certification in Massachusetts;
- Contractual details and other concerns that the Committee wishes to address.
- Assisting in the public information component of your search.

Throughout the search, the MASC staff consultant will provide regular updates on the progress of the search and will be available at all times to provide general consultation and answer questions.

#### **B. Announcement of Vacancy**

MASC is in an excellent position to announce the vacancy nationwide. The network of organizations and services that MASC will contact via first class mail and/or web site postings to announce the vacancy includes, but is not limited to:

- More than 900 superintendents and assistant superintendents on our distribution lists.
- Vocational and technical school administrators.
- All state school boards associations and state superintendent associations.
- National School Boards Association.
- National Association of Superintendent Searchers.
- College and university placement offices that offer advanced degree programs in

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for screening and interview at the discretion of the search or school committee.

- k. Recommending Finalists. MASC will guide the search committee or school committee in identifying its finalists.
- l. Verifying Credentials. This is a routine part of the application process. In addition, credentials must be thoroughly verified prior to the finalist stage.
- m. Background Checks. MASC conducts thorough background checks as a routine part of a search process.
- n. Attend First and Last Interview Sessions. It is generally expected that the search consultant will attend all interview sessions, acting as a liaison between the candidates and the committee(s).
- o. Establish Contract Parameters. MASC provides not only on-site guidance and technical assistance, but has a resource document with an inventory of items that may be included in a contract proposal.



educationally related fields.

- Announcements in MASC and MASS publications.

In addition, the Committee may wish to place advertisements in local or regional newspapers and other publications such as *Education Week* and local and regional outlets.

Working with the Committee, MASC will develop, design and print an application form and a brochure to advertise the vacancy and outline application procedures. Copies of the brochure and the application form will be sent to all the organizations listed above and to all persons who indicate an interest in applying for the position. Copies of all such materials will be available to the Committee.

### **C. Recruitment**

MASC will recruit candidates actively through its network of professional associations, academic institutions, colleges and universities, personal contacts, media, and advertising in addition to responding to candidate inquiries. Complete packages of information about the search will be distributed to a list that can be extended to more than 1,200 members of the professional educational community. In addition, MASC will work with the School Committee to develop the advertisement copy and promotional information as noted above and below.

All candidates are provided with information to reach the search consultant at any time, including cell and home phone numbers.

### **D. Application Processing**

Each person who inquires about the position will receive an application form, and a brochure indicating the qualifications required for the position and providing information about the community and the school system.

A complete application file includes the following:

- A completed application form
- An up-to-date resume
- A copy of the applicant's Massachusetts certification for the position of superintendent or evidence that the applicant is eligible for Massachusetts certification and has an application on file with the Department of Education. ***These documents must be received by MASC or be postmarked on or before the announced deadline.***
- A university placement file or other transcript, credit and degree documentation;
- Three current letters of reference.

Files of all applicants to be interviewed by the Committee will be provided to the Committee for use during the interviewing and reference-checking process. Throughout the application process, the Committee will be updated regularly.

### **III. COMMUNITY AND STAFF INVOLVEMENT**

If the Committee is interested in involving staff and the community in recommending the qualities and strengths that the Committee should seek in a new superintendent, the consultant will discuss with the Committee the form that such involvement might take and the extent of the consultant's participation in this phase of the search.

MASC will conduct focus groups for faculty, parents, students, the other community stakeholders and the public at large and compile a report to help guide the process, define the credentials and profile of your next superintendent, and identify the priorities of the people who will work with your new leader.

In addition, MASC has the capacity to offer community members an opportunity to respond electronically via an on-line survey instrument which has often been preferable to live focus groups.

MASC will also orient the School Committee and/or the Search Committee to the full extent of their responsibilities and with detailed presentations on their roles.

### **IV. SCREENING PROCESS: SELECTION OF SEMI-FINALISTS**

It has become more common than not for the Search Committee or the School Committee to screen in full all applicants for the position of superintendent. However, at the discretion of the school committee, MASC will also screen candidates and rate them and may call upon a screening committee composed of two persons selected from a cadre of qualified professionals and the MASC lead consultant. They will screen the applications based upon the criteria determined by the Committee and recommend candidates for further screening and an initial interview by the Search Committee or School Committee. The consultant will deliver the files of those selected as semi-finalists to the appropriate Committee, notify the unsuccessful applicants, and will attend all interviews if it is the wish of the Committee that MASC do so. (It is generally expected and anticipated that the search consultant will attend all interviews and screening sessions.)

Should a search committee be used, following the initial interview, the consultant will present the names and files of those selected as finalists to the School Committee. Prior to the finalist interviews, the consultant will meet with the Committee to establish an interview schedule, to discuss the interview process and to assist in selecting and developing questions.

### **V. THE FINAL SELECTION**

Following selection of the finalists, the consultant will notify those semi-finalists who were not selected and will schedule finalists' interviews.

The consultant will assist the Committee at its discretion in in-depth reference checks and with the scheduling of visits to the finalists' communities. MASC has special resource material for the reference checking process.

The consultant will notify the successful applicant and the unsuccessful finalists.

The Committee will probably wish to involve its legal counsel in contract discussions. However, MASC will also assist in contract negotiations with the prospective superintendent and provide resources to the Superintendent Search Committee and School Committee as their needs require.

## **VI. FOLLOW-UP**

After the Superintendent has had the opportunity to become acclimated to his/her new situation, MASC will be available to conduct a workshop for the Committee, the Superintendent and those administrators selected for participation by the Committee. This session deals with the Roles and Responsibilities of the Committee and the Administration and with other issues that the Committee might wish to address. The workshop will be scheduled at the convenience of the Superintendent School Committee and Administration.

MASC will work with the School Committee and superintendent as part of your association membership to engage in professional development, support, and resource network to ensure that your superintendent becomes a successful leader. This commitment is ongoing from year to year.

Should the individual retained as superintendent fail to complete two years of service to the district, MASC will assume responsibilities of re-instituting the search process at no additional charge to the School Committee.



## **VII. COST PROPOSAL**

Removed by BMC

## WHY SHOULD MASSACHUSETTS ASSOCIATION OF SCHOOL COMMITTEE MEMBERS RETAIN MASC AS THEIR SEARCH CONSULTANT?

MASC prioritizes “customer service” to its members. That means:

- MASC has worked collaboratively and successfully with all types and sizes of districts, including municipal, regional, and vocational and technical school districts.
- You always have fast and direct access to your MASC staff (including office, e-mail, and cell phone).
- The search is adapted to meet your requirements and preferences. You get the search services you want, and not the search process someone has decided you should have.
- You will know your search consultant because they’re full-time employees of MASC and work with you throughout the year.
- MASC staff are “in the building” with you at every phase of the search, including working with the search committee, question development, resume screening, all interviews, and, subject to the desire of the school committee, deliberations.
- MASC has extensive and invaluable resource materials to assist you in every phase of your search including: selecting and orienting your search committee, recruiting, question development, parliamentary procedures, processes for candidate screening, site visiting, formally electing a superintendent, and transitioning.

MASC serves your search committee in the same way with a successful track record of orientating and supporting this group to help you find the best candidates.

MASC is your association and represents you, your district, and your interests.

Our search staff have all served on School Committees and understand how board members relate to the search process. While we recruit actively and welcome respectfully all candidates for your superintendency, each MASC search generates a fresh and independently recruited group. We do not maintain a “stable” of candidates whom we impose on School Committees, nor do we exclude candidates who are outside our circle of contacts. Many interested candidates maintain active contact with MASC throughout the year.

- MASC’s panel of reviewers also includes respected and experienced educators who can assist you in screening candidates. However, the School Committee (and search committee) have access to all applications and support materials at all times to ensure that the you will have final say on their decisions.

MASC has been conducting successful superintendent searches for more than 30 years.

We work directly with most of the state's School Committees and superintendents and collaborate with the National School Boards Association and the National Association of Superintendent Searchers (MASC's staff are all active members of NASS.)

- MASC works with you to analyze your needs, conduct community focus groups, and develop a report to help you determine the best process, credentials, background, and candidate profile for your superintendency.
- MASC has a track record of recruiting superior candidates to meet your school system's needs so you can hire the kind of superintendent you want, not the candidate someone has decided you should have.

When your search is concluded, MASC continues to serve you as it has since 1947.

We don't disappear when the new superintendent is hired, nor do we use the search process as a vehicle to generate subsequent consulting services. MASC works with you and your new superintendent to ensure the success of the search process and the continued success of your School Committee and school district.

MASC has the resources in-house to assist you and to help manage expenses:

The success of your search relies more on the diligence of your search team than on the money you spend. We know how tight budgets are and we work with you to manage your search costs.

- MASC's staff is part of your search team. They include experienced search consultants who have served on School Committees and who understand how important the superintendent/School Committee relationship is. They're also experienced in the administrative, procedural, public relations, communications, and political aspects your job – experience that is invaluable during a superintendent search and work year-round.
- Our communications director leads the editorial and creative arts team that includes our full-time graphic designer to ensure that you have direct contact with the team and speedy turn-around of the brochures, advertising copy, and materials you need.
- MASC works with our advertising agency to secure timely ad space where you want it and imposes no service charges or mark-up.

**MASC recruits nationally and actively from pools of qualified candidates, working collaboratively with the 52-member roster of National School Boards Association and 50 state superintendent organizations.**

- MASC cultivates relationships with both institutional and professional sources to recruit outstanding candidates and maintains a large distribution list and contact list to help spread the news of your position, identify potential candidates, collaborate with institutions of higher education that train school administrators, and advertise nationally.



MASC works with you throughout the search process to the contracting and settling-in stages.

MASC is with you at every step and provides many “added value” components to its professional services. Our staff have demonstrated experience in:

- Complying with and interpreting the Open Meeting Law, procedural requirements, rules of order, and other technical process questions.
- Providing School Committees with guidance on some of the intricate steps for administrative procedure, parliamentary process, community relations, communications strategies and working with the media, and advising the chair on meeting strategies.
- Maintaining confidentiality.
- Guiding you through unexpected developments.
- Developing the kinds of interview questions that get candidates to think, reveal themselves, and demonstrate competence.
- Maintaining contact with candidates throughout the process and providing them with timely information and decisions.
- Checking references with our counterparts in the NSBA member network.
- Resources for arranging site visits to see the people you want to see.
- Identifying the key components of employment contracts and assisting you in negotiation

## MASC RECRUITING RESOURCES FOR SCHOOL COMMITTEES

### **DIRECT MAIL AND OUTREACH:**

- 1,200 Person Recruitment List maintained by MASC.
- Extensive List of New England and Regional School Superintendents
- National Association of Superintendent Searchers (MASC is the state's only member superintendent search organization.)
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- Career and Placement Offices of Private and Public Colleges and Universities that Train Superintendents
- Graduate School Program Administrators who train superintendents
- Urban Superintendent's Network
- Councils of Urban Boards of Education
- Associations Representing Principals and Special Education Administrators

### **PERSONAL RECRUITMENT<sup>2</sup>:**

- MASC and other members of the NSBA state association network regularly discuss the pool of interested candidates, including recent retirees who are eager to serve in other states for 5-10 years.
- Direct contacts with prospective superintendent candidates who are identified from:
  - MASC extensive relationships
  - School Board Associations extensive relationships
  - References from graduate schools and professional contacts.

### **MEDIA:**

- Education Week (read by 55-60,000 aspiring administrators weekly)
- Local Media as Directed
- NY Times, Boston Globe (On line advertising is more cost efficient than print advertising.)

### **REFERENCES:**

The School Committee should feel free to contact the school committees of any district listed on the list of completed searches.

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<sup>2</sup> MASC does not maintain a "stable" of candidates who are automatically pooled as potential candidates for every client district. We do have extensive personal and professional relationships with education professionals who include current and aspiring superintendents, candidates who have expressed interest in MA superintendencies, previous MA superintendency candidates and others. These contacts include most Massachusetts superintendents and Assistant Superintendents and many out of state professionals.

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No-Fee Technical Assistance Services to School Committees

Should your district elect to oversee its own search using technical assistance from MASC, the following services would be provided without fee. Mailing and advertising charges are assessed only if MASC has to pay a printer or postage for your materials. There are no labor charges.

Technical assistance to:

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- Other services by request, subject to availability of staff.



~~Superintendent Search Information~~  
~~And~~ Cost Proposal  
and  
Alternative – No Cost Services

Submitted by

Massachusetts Association of School  
Committees

## **VII. COST PROPOSAL**

The total cost of the superintendent search consultancy includes three elements: the process that includes professional services, consultant expenses, postage and collateral material preparation, and advertising.

### **A. Search Process and Consulting Services**

\$ 11,500 (includes all staff, labor, expenses, and consulting services) for MASC Member Districts.

### **B. Advertising**

Since the cost of advertising can vary greatly depending on the publications that the Committee selects for its announcement of the vacancy, paid advertising is billed to the Committee at the actual cost of the ads. Ads in the *Sunday Boston Globe* and *Education Week* would cost approximately \$3,800 to \$4,000 depending on size. The Committee will be provided with copies of the bills and advertisements.

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- Guidance on adhering to the MA Open Meeting Law.
- Assist you in preparing for a site visits.
- Telephone access for questions.
- Other services by request, subject to availability of staff.

# LOOKING FOR A LEADER

A Guide to Searching For a Superintendent

A GUIDE AND CHECKLIST  
FOR THE  
SCHOOL COMMITTEE

masc

Newly Revised, 2022

Prepared for the exclusive use of its members by the  
Massachusetts Association of School Committees

One McKinley Square

Boston, MA 02109

617-523-8454

## **INDEX**

|                                                                      |           |
|----------------------------------------------------------------------|-----------|
| <b>LOOKING FOR A LEADER</b>                                          | <b>3</b>  |
| The School Committee's Guide to the<br>Superintendent Search Process |           |
| <b>THE CHALLENGE OF LOOKING FOR A LEADER NOW</b>                     | <b>4</b>  |
| <b>WHAT'S THE BEST TIME FRAME FOR A SUPERINTENDENT SEARCH</b>        | <b>7</b>  |
| <b>WHAT TO DO WHEN YOU KNOW YOU MUST SEEK A SUPERINTENDENT</b>       | <b>8</b>  |
| <b>SEARCH PREPARATION</b>                                            | <b>9</b>  |
| <b>MANAGING YOUR OWN SEARCH</b>                                      | <b>14</b> |
| <b>BUDGETING FOR A SEARCH</b>                                        |           |
| “What's this going to cost?”                                         | <b>16</b> |
| <b>A QUICK CHECKLIST OF ITEMS IN THE SEARCH PROCESS</b>              | <b>17</b> |
| <b>DISCRETION IN PLANNING FOR YOUR SEARCH</b>                        | <b>19</b> |
| <b>SPECIAL CONSIDERATIONS FOR SCHOOL COMMITTEES</b>                  | <b>20</b> |
| <b>CONDUCTING SUPERINTENDENT SEARCHES</b>                            |           |
| <b>MASC MEMBER SERVICES (Basic Membership)</b>                       | <b>23</b> |
| <b>SHOULD WE EMPLOY A SEARCH CONSULTANT</b>                          | <b>24</b> |



## **LOOKING FOR A LEADER**

### **The School Committee's Guide to the Superintendent Search Process**

Hiring the superintendent of schools is one of the most important decisions the School Committee will make. The person you select to lead your district will influence the school district for years to come. Your ability to meet high standards, improve student achievement, serve every student effectively, find outstanding personnel, build for the future, develop positive relationships with your community and the area businesses, and secure a favorable reputation for your district may well depend upon the kind of superintendent you choose.

School Committees seek superintendents of schools for several reasons. Whether they are successful or not in finding a top notch individual may depend upon many factors including several that you may not be able to control.

During the search planning process and right through to the end, the Massachusetts Association of School Committees (MASC) is here to help you review your situation, explore your options, and plan your course of action as you get ready to look for your new leader. MASC provides consultation services or manages superintendent searches for about 25 school districts every year. In many instances, districts that choose to administer their own superintendent searches rely heavily on MASC technical assistance that is available to all our members without charge. As your association, our goal is to help the School Committee find the superintendent, develop goals, and implement their policies to serve the district and the community. With our staff of experienced former and current School Committee members, we understand the concerns and needs of the School Committee and appreciate the unique relationship between members and superintendents.

## THE CHALLENGE OF LOOKING FOR A LEADER NOW

Massachusetts school districts can expect to find many highly qualified and competent candidates for the Superintendency. On one hand, Massachusetts attracts candidates from all parts of the country because it is culturally rich, the population is diverse and well educated, the economy is generally ahead of the rest of the country, even in a recession, and all kinds of professional and technical support services are available to school leaders from the many colleges and universities.

In addition, the New England region and nearby states like New York are organized by school districts that often represent individual communities. With more than 2,000 school districts located within a 3-5 hour drive, this region is regarded nationally as one of the country's principal "incubators" for superintendents who may be interested in the challenge of leading your district.

On the other hand, finding an outstanding superintendent is more of a challenge than ever before. For several reasons, recruiting a superintendent to a Massachusetts school district is a special challenge. Here's why:

1. The pool of available candidates is more shallow than in past years. The state's early retirement incentive program has resulted in the loss of many outstanding candidates who choose to leave the field in their late 50s or early 60s.
2. Public pension programs provide huge incentives to remain in one state, especially in the latter years when retirement benefits grow substantially over the last ten years prior to retirement. Massachusetts pension portability laws make it difficult for administrators from other states to transfer all of their pension credits to Massachusetts. For that reason, experienced educators may wish to remain in their present state pension programs in order to gain a better retirement benefit rather than transfer to a new plan in Massachusetts.
3. Many educators who would be in their prime years for principalships and superintendencies left the profession after being laid off during the early years after passage of Proposition 2 ½. Many never returned to positions in Massachusetts public education.
4. The cost of relocating can be overwhelming. "Sticker shock" over the price of a home in Massachusetts often discourages potentially superior candidates from districts with lower real estate values.
5. Relocating can present employment problems for spouses, too. Candidates will worry about employment for their husbands or wives who must also relocate.

6. Being a superintendent is a very difficult job. Not everyone wants to have it. With all the challenges of accountability from MCAS and the Every Student Succeeds Act, along with other high expectations for the position, many potential superintendents would rather stay where they are.
7. Being a Massachusetts superintendent is especially challenging. Massachusetts is one of the few states where local communities manage their own school departments. (Most states use county systems or independent school districts.) The new superintendent must be comfortable not only with the academic side of school administration, but also the principles of Massachusetts General Laws on education and the complex school finance system that includes the Foundation Budget, state revenue distribution formula, complex special education reimbursement laws, and the nuances of working with local government – including mayors, city councils, finance committees and town meetings.
8. The Massachusetts Open Meeting Law means that many candidates must agree to have their names published as part of the screening process. While some steps can remain confidential, finalist interviews are not. It's no great shame to be passed over after becoming a finalist, but it's no great honor either. Many able candidates do not want to risk the public humiliation of being screened out, passed over, or not selected after going through several stages of a search.
9. Media coverage can get in the way of a search and discourage candidates who wish their applications to be confidential for the longest period of time. Entering a search makes a candidate the subject of close scrutiny, and the press is neither bound by the open meeting law nor employment law. They can ask questions that would be inappropriate if not illegal for a potential employer. Many media outlets are very aggressive in chasing down stories from the candidates' local newspapers. If a candidate is controversial, that person may not want to risk having the report taken out of context before they can meet with you.
10. Individuals looking for jobs may be candidates in several simultaneous searches. You may be competing with other local, regional, or out-of-state districts for the same limited group of interested candidates.
11. Reference checking can present a special challenge. Candidates will offer names of people they want you to see or whose statements they want you to read. Probing into the many areas of potential competence is more difficult. It is not unusual for districts to receive resumes of individuals who are not currently employed but whose resumes are designed to say otherwise. Similarly, individuals who have been fired, whose contracts have not been renewed, or who left "voluntarily" or "on their own terms," but, in reality, one step ahead of a termination vote are not uncommon.



12. Your community's reputation or history may be a plus, but it can also be a negative. Some of the potential negatives may include the following:

- Unsatisfactory or unclear reasons for the departure of prior superintendents.
- Reputation for political interference in school operations.
- Inadequate administrative support for the district to carry out its mission.
- District financial problems.
- Poor relations between the local school district and the city or town government.
- Special problems that have hurt your district's image.

However, good candidates often overlook negatives and want the challenge and opportunity to demonstrate their leadership capacities to overcome them.

It's always important to assess why you have a vacancy, why your superintendent is leaving, and what you can do to avoid problematic situations in the future. These are among the factors School Committees should consider when they start identifying their administrative leadership needs.

## WHAT'S THE BEST TIME FRAME FOR A SUPERINTENDENT SEARCH

Ideally, your search should allow you time to cover all the necessary steps and public process you desire. However, there are few hard and set rules. Successful searches have taken as little as four weeks and as long as six months. They begin at all months of the year. Hiring decisions that bring outstanding and successful superintendents are made all year long.

A frequent question is “What is the best time to start a search?” or “Is late spring or summer too late to begin?” The answer is “Yes” and “No.”

A late spring or summer start may be problematic for some of the following reasons:

- You may not be able to complete your search as fast as you think.
- A late hiring decision that might not allow for a proper orientation or enough time for the new superintendent to begin planning for the start of school can be problematic.
- Many incumbent superintendents must provide 90 - 180 days' notice to their current district before leaving. Thus, you may approve the appointment of your superintendent in May or June but not have the person available to you until September or later.

On the other hand, many successful searches begin late in the school year and conclude during the summer. The reasons they are successful include these:

- Many outstanding candidates are not sitting superintendents but may have successful experience as a superintendent or ranking central office administrator.
- It is not unusual for an outstanding candidate to have taken a position at a university, organization, or consulting firm only to have a desire to return to the world of public education.
- Some outstanding candidates who have taken early retirements from their districts (including out of state positions) realize that premature retirement was not a good choice and wish to get back to work. This is more common during a severe recession when people find their retirement savings will not go as far as it would had the stock market not deflated.
- Many candidates come from districts with strong administrative teams who can provide smooth transitions and even take over for the person who is leaving.

## WHAT TO DO WHEN YOU KNOW YOU MUST SEEK A SUPERINTENDENT

Here are several things to consider when you learn that it is time to seek a new superintendent.

**What kind of search will you conduct?** You will need to decide on the following as soon as you anticipate that you will have a vacancy:

1. **Temporary or Interim Superintendent.** It is not unusual for a vacancy to occur late in the academic year. Rather than move forward quickly and risk drawing from a smaller pool of candidates, you may want to fill your position temporarily, on an interim basis, while you conduct a search over a longer period of time. You will also need to determine how long your interim superintendent will serve. Some serve for as long as a full year. Consider this:
  - Your time frame. Do you simply need to fill a short gap prior to the start of the school year or until a clear appointee is identified to arrive shortly? Will you need an interim superintendent for a number of months while you conduct a search? Will you want to take a longer time for the search and use the interim superintendent for as long as a year? MASC maintains a list of experienced professionals willing to act as an interim superintendent.
2. **Internal Search.** Districts with credible inside candidates, including those with strong potential may choose to do an internal search first before considering a more broad, external search. (See below.) On one hand, this may improve morale and recognize your strong internal candidates whom you have cultivated as leaders. Strong succession management is a sign of a good organization. On the other hand, considering and passing over internal candidates may have a counterproductive impact. For that reason, districts often opt to engage in an open or external search and welcome internal candidates to apply on equal footing with others.
3. **Open or External Search.** If you elect an external search, you will need to consider how broadly you will conduct the project. (See below.)
4. **Running Your Own Search or Retaining a Search Consultant.** If you wish to conduct an external search, you must decide whether to manage your own process or retain a search consultant. If you wish to consider a search consultant, interview from the roster of individuals and organizations that provide those services. Excluding your own staff and School Committee time, a search can cost as little as the cost of postage, printing, and advertising (for a search you manage yourselves) to \$8,500 - \$35,000+ for consulting services.

MASC provides technical assistance to many districts that manage their own searches. With our help, they are able to handle the administrative, tracking, advertising, interviewing, and reference checking. The major advantage to managing your own search is in cost savings and the ability to retain full control over every aspect of the process. The significant disadvantage is in having to handle the time consuming details and processes within your own district with staff on hand. This often requires you to reprioritize other projects.



## SEARCH PREPARATION

As you begin your search for a new Superintendent of Schools, MASC recommends that you give careful consideration to the following. The extent to which you develop these criteria may vary with the status of the superintendent-to-be (acting, interim, internal search candidate, external search candidate).

Right at the start it is important to assess the district needs, strengths, areas for improvement or growth, and aspirations for the future. Some districts need organizational leadership, administrative management, development of relationships with the city or town, public relations, or rebuilding of an image to attract students. Others may require financial reorganization, recovery from crisis, alignment of curriculum with the state frameworks, reaccreditation, or complete turnaround. No two districts are alike.

Even more, you should assess why you have a vacancy in the first place. You may be losing a long-time, successful leader to retirement or failing to renew the contract of your incumbent. Your relationship may have been historically strong or recently deteriorating. Your community may be a strong supporter of public schools or cynical critic of the cost of public education. All these factors can weigh into your decision about how to craft a search and recruit a great pool of candidates.

Focus groups, community meetings, and surveys can be very helpful in organizing the search, but also, self-assessment of the district and the School Committee can be highly instructive.

### **1. Determining the qualifications required for your superintendent and the criteria by which you would assess candidates.**

- Consider the reasons that your vacancy exists (see above) and determine why you're looking for a leader and what gaps that leader should fill.
- Examine the current job description versus the actual duties being handled by the incumbent or interim superintendent.
- Does the job description need to be updated?
- What is the required minimum standard for applicants? For example, will you require a doctorate, minimum number of years of experience, or specific experience (e.g., principalship experience; financial expertise; curriculum proficiency; other administrative background)?

## **2. Determining the extent of staff / community involvement**

To what extent will you involve the community or staff in the process? There are several areas where the school community or public at large may want to have a role, and these areas should be explored and roles determined ahead of time. Because of public interest, the requirements of the Open Meeting Law, and the need to maintain a credible and open search process, it will be important to consider the public's role.

For example:

- **Community Goals and Objectives and Using Focus Groups.** Most searches are preceded by a series of focus groups with members of the community at large and members of the school community to identify goals, objectives, criteria for the superintendent, and search processes.
- **Search Committee.** There are several formats for the Search Committee. The School Committee may act as its own search committee, but most often, a panel is selected to handle steps such as screening and initial interviewing of candidates. This “panel” may include none, one, some or all of the School Committee members. If a quorum of School Committee members is involved as the search committee or part of the search committee all meetings must be in public session.
- **Resume Screening.** You are likely to receive many resumes for your Superintendency. A screening committee is often utilized to review resumes and rank them for the School Committee.
- **Interviewing.** Searches usually involve at least two rounds of interviews. Districts use several formats. It is important to determine who will interview candidates at which stage.
- **Observing.** Many elements of the search process take place in public. However, some may take place in executive session based on the situations at hand and the applicability of the Massachusetts Open Meeting Law.

## **3. Determining the “compensation” (i.e., salary, benefits, etc.)**

Place a value on the job, not on the person who may fill the position. MASC can provide you with salary and benefit information for superintendents in districts comparable to yours.

You may want to determine a salary “plus a benefit package to be negotiated.” Often the benefit package enhances substantially the value of the overall employment offer or the simple salary base.

You must face the fact that the range of salary and benefits will have a direct relationship to the number of candidates – especially in communities where real estate prices are high.

#### **4. Develop a time line for your action steps.**

Establish a firm calendar of events working backwards from the date you expect the new superintendent to assume his/her duties.

Include planning dates to design the interview format and the dates and times the interviews will take place.

Be very clear about deadlines for submitting applications. Define what is an acceptable format (postmark, received in house, received by fax, etc.).

Decide if you will interview all internal candidates who meet your qualifications and criteria. This is strongly recommended, but School Committees should be cautious in not giving false expectations to candidates or the community.

Base your interview questions on the criteria and skills required for the job.

#### **5. Advertise Thoughtfully**

An internal posting of the vacancy should fulfill all the advertising requirements for an internal search.

If you go to an open, external search, you will need to assess the most effective ways to announce and publicize your vacancy. MASC can advise you on effective vehicles and strategies for announcing your vacancy and seeking out candidates including the best places to advertise.

#### **6. Appoint a contact person**

All inquiries regarding the search should be directed to the contact person. This may be a member of the School Committee who is coordinating your search, a personnel officer of your district, or your search consultant. This ensures that all candidates are given consistent information. It also ensures that confidential information is kept confidential. We recommend that the contact person be a member of the school committee for internal search purposes and for searches that you manage yourselves.

#### **7. Develop your Process Documents and Protocols**

Several items comprise your search protocols. They include:

- The formal application.

- The list of requirements for submission. These often include letters of reference, transcripts, statement of academic vision, responses to certain additional questions, writing samples, and resume.
- The process for compiling and confirming receipt of the candidate information.
- Agreements as to who must cover the expenses of candidates coming from out-of-town for the interviews. Remember, there may be as many as two or three visits to your district and an additional one for you to visit the candidate's district.
- Arrangements for interviews, including logistics and content.
- An inventory of questions for candidates for interview sessions at various stages of the process.
- Plans for site visits. Candidates should know ahead of time that finalists will be expected to arrange a site visit. This is a critical stage in the process.

## **8. Develop a contract proposal**

Work on a draft employment contract and have it completed prior to the appointment. Be ready to present your appointed candidate with a proposal in order to avoid reacting to his/her proposal. Candidates will be well prepared with model contracts favorable to them.

MASC has always advised school committees to conduct an internal superintendent search when the committee believes that there are qualified candidates working within their school systems. It is non-productive to conduct an external search spending time and money to find "the right person" if "the right person" is already there. It is important to explain that perspective to the public.

An internal search recognizes the merits of perspective candidates already working in the district. It in no way restricts the school committee from conducting an external search in the future should that become necessary.



## IF YOU ARE MANAGING YOUR OWN SEARCH, CONSIDER THIS:

MASC can assist you in every aspect of your search process as part of your association membership. Here are some of the important factors to keep in mind.

- It can take from four to six months to complete a search, and even longer if you experience problems. Work out a careful time frame. Searches can be rushed and completed very quickly but this requires a shorter application period, abbreviated community involvement, more quickly expedited interviews, and faster but thorough reference checking.
- Plan carefully to anticipate the date you want your new superintendent on board. It may be necessary to develop a transition plan where your former superintendent remains available or where your new superintendent arrives early for an overlap period.
- The best time to seek a superintendent is one that allows for a start date in July or August. Many districts begin in September for a next July or September start date.
- Plan for a means of determining how your new superintendent will bring qualifications that will fit and accommodate your district's requirements and needs.
- Identify your point person who will lead the search; this should be someone in charge who can make decisions that must be made quickly.
- Before you advertise, carefully select your criteria, job qualifications, credentials, and a salary to post. Review comparable data on salaries to ensure you will be competitive.
- Determine if your outgoing superintendent is going to have a role in the process. (Often this is neither necessary nor desirable.)
- Identify how you will involve the public in screening, interviewing, and assisting in the process. Make sure you have a fair process for using non-School Committee members if you elect to invite the public to participate.
- Plan your advertising program to attract as many applicants as possible.
- Agree *in advance* what candidate expenses you will pay. Will you pay to bring in semi-finalists or finalists, and which of their expenses will you reimburse?
- Try to anticipate issues and problems that may arise during the search.

- Schedule interviews that provide a fair apportionment of time for all candidates.
- Develop insightful questions for your candidates. (MASC can assist you in developing these questions.)
- Plan thorough site visits to the home district of your candidates. This is your best vehicle to ensure that your candidates are a) whom they say they are; b) subject to reference discussions by people who really know them; and c) doing a good job in their districts.
- Prepare a model contract before you begin negotiations for a final agreement.

## BUDGETING FOR A SEARCH: “What’s this going to cost?”

Plan on the following expenses and identify which ones are covered in-house vs. what you will need to pay for:

- |                                                |                                                         |
|------------------------------------------------|---------------------------------------------------------|
| • A search consultant                          | \$7,500 - \$50,000+                                     |
| • Internal clerical assistance                 | In-House expense                                        |
| • Advertising                                  | \$4,000 +                                               |
| • Printing (brochures, applications)           | \$500 (2-color) - \$1,500 (4-color)                     |
| • Postage                                      | \$ 250 - \$600                                          |
| • Expenses for candidates                      | Varies. Can exceed \$10,000.                            |
| • Expenses for Search Consultants              | \$1,500 - \$10,000*                                     |
| • Expenses for School Committee on Site Visits | Up to \$2,000 per member if air and hotel are required. |
| • Legal Expenses for Contract Review           | Varies**                                                |

\* Can vary if search consultant goes on site visits.

\*\* If not built into the basic consultant fee, these additional expenses may vary depending upon nature of contract negotiations and availability of municipal counsel to negotiate the contract.

## **A QUICK CHECKLIST OF ITEMS IN THE SEARCH PROCESS**

### **The Search Process:**

- What is your timeline for each step in your search (listed below).

### **The Application:**

- Have you designed the form to include the content you wish?
- How many letters of reference do you want and of what nature (professional, personal, academic)?
- What kind of credentialing confirmation do you want?
- Who will verify completeness and accuracy of data?

### **Advertising Your Vacancy:**

- How will you recruit from among professional and academic ranks?
- Where will you place your advertising?
- What collateral material will you use to promote your vacancy? (e.g., search brochure)

### **Screening the Candidates:**

- Who will receive the applications?
- Who will review the candidates?
- Will you use a screening committee, school committee subcommittee, school committee itself, or a variation?
- What parts of this process should be confidential?
- Which candidates will get initial interviews?
- Will you treat internal candidates differently from external ones in guaranteeing interviews?

### **Interviews:**

- Who will arrange the interviews?
- Who will serve as the candidate liaison to keep in contact with them and guide them to the interviews?
- Who will do background checks?
- Who will conduct the interviews? How long will they be? When and where will they be held?



### **Selection Process:**

- How many semi-finalists and finalists will you want? Is there a minimum number?
- Who will notify the successful and unsuccessful candidates?

### **Site Visits:**

- Who will arrange them?
- Who will make the visits?
- Do you want your consultant to join you?
- Who will you want to interview?
- Who will make the site visit report?

### **Final Interviews:**

- Who will arrange the interviews?
- Who will serve as the candidate liaison to keep in contact with them and guide them to the interviews?
- Who will conduct the interviews? How long will they be? When and where will they be held?

### **Formal Superintendent Selection – Final Stage:**

- What process will you use?
- Who will be responsible for notification of unsuccessful candidate(s)?
- Who will facilitate expense reimbursement?

### **Negotiating the Contract:**

- Who will negotiate the contract?
- What is your approval process?

## DISCRETION IN PLANNING FOR YOUR SEARCH

The events leading up to a superintendent transition, including a search, are not always so easy to plan, especially if a member or group of members would like to replace the chief executive. For example, occasionally a superintendent learns during an evaluation process that extension or renewal of their contract is unlikely. At the same time, members come to realize at some point that there may be consensus to change superintendents even though no vote, meeting, or discussion has taken place.

MASC members often ask us for information like the following:

- How does the search process take place, if one is going to happen?
- What does the candidate pool look like, just in case we might be looking?
- What are the political implications of such a change on short notice, or even with some evolving consensus in our community based on your experiences to date?
- What are the rights of the affected parties?
- How does the Open Meeting Law affect my ability to discuss options with my colleagues?
- What does the incumbent's contract or employment status mean in terms of the process(es) we must follow in changing leadership.

MASC staff speaks with individual School Committee members every day on a range of subjects. We often discuss questions about transitions of leadership with our members when they call. However, individuals must understand that our members are School Committees and such issues are only reviewed with individuals in general terms. Specific proposals or processes related to superintendent contracts, employment, hiring, and dismissal are the exclusive purview of the School Committee acting as a body. We urge members to consult with their committee chairs, conform to the Open Meeting Law, and use the appropriate steps such as their evaluation process, contract reassessment, or notice provisions to keep their colleagues and superintendents aware of their intent and activities.

## **SPECIAL CONSIDERATIONS FOR SCHOOL COMMITTEES CONDUCTING SUPERINTENDENT SEARCHES**

### **1. Be particularly careful about how thoroughly and how early you do your background work on candidates and reference checking. Here's why:**

- Not all references will be fully forthcoming. Some will be eager to do whatever it takes to get rid of their superintendent. Others will be biased in favor or against an individual for personal reasons.
- Not all candidates are who they say they are in terms of their employment status.
- Not all candidates are truthful about their credentials, academic training, current employment status, or employment history.
- Superintendents may have left their previous positions under difficult-to-discern circumstances.
- Superintendents may have left under fire but performed with excellence.

#### **THEREFORE:**

- Conduct your background work skillfully. Use the Internet or Lexis/Nexis to check status, district information, and media coverage of the candidate and the district.
- Require an authorized academic transcript for each relevant credential or degree.
- Seek early feedback on basic information about candidates, including employment status, employment history, and current performance issues.
- Seek information from a range of sources.
- Consult with MASC for guidance in checking references in other states. They work with superintendents and school committees, and their loyalties are to you.

### **2. Be mindful of the role the media will play in “helping” you do your search.**

You, your search consultants, and the media have different clients and, thus, differing loyalties. The School Committee's loyalties are to the community and the students. Your consultant's loyalties are to the School Committee. However, the media's loyalty is to their readers and the First Amendment.

In some communities, reporters are eager to identify candidates and do their own background checks sooner than your process might require. For example, if you wait until the names of semi-finalists are announced to begin checking backgrounds, you might find out that a candidate may have an embarrassing element to his/her background, a controversial past, or something that can be taken out of context to discredit the person. Local reporters, on the other hand, are not bound by any school policy or process requirements. They can start

digging right away, and they can talk to anyone and ask any question they like. Moreover, they are accountable to their editors, not to you.

In one community, a reporter made inquiries in an out-of-state community and found that a candidate for superintendent in his town had been charged with “sexual harassment.” The story broke and sent the search into turmoil. The School Committee was embarrassed that this had not turned up in preliminary checks. There was a good reason. A disgruntled member of a union bargaining team had falsely accused the superintendent. The story had a shelf life of one day before it was forgotten, but it did appear in a Nexis search. Had a more thorough discussion taken place, however, the search committee could have responded to media inquiries right away. Another candidate was rumored to have been caught shoplifting based on the reading of an article in the local newspaper. The real story: it was his predecessor, not him who had been arrested for theft.

*NOTE: This problem reinforces the critical importance of your site visit. On a site visit you can decide whom you want to interview, explore the community, speak with civic leaders, talk to a range of school department employees, consult with PTA officers, etc. If reporters embarrass you with questions about why you didn't know this or that, you can respond that it was because your final interview process included an in-depth site visit to the home school and community.*

THEREFORE:

- Do a more thorough check early on.
- Use the Internet and Lexis/Nexis, if available, to check out local reports in the district.
- Ask every candidate who is about to move from the screening process to the “semi-finalist” stage, “Before you go to the next step, we need you to answer these questions:
  1. Are all your credentials in order and accurate, including your academic transcript?
  2. Are you aware of the salary range and are you willing to go forward to the next stage?
  3. If offered the position, are you still willing to accept or give it most serious consideration?
  4. Is there anything else about you or your background that we need to know or that you would like to tell us, including anything that a prospective employer needs to know, especially if the media is going to uncover it before we do?

### **3. Adhere faithfully to the Open Meeting Law.**

The law allows for an executive session “to consider and interview applicants for employment by a preliminary screening committee or a subcommittee... if an open meeting will have a detrimental effect in obtaining qualified applicants;”. Once a prior screening process is concluded, however, all interviews and screenings must be in open session. The court has



found that a single objection from a single candidate is justification for holding the initial screening process and/or interview in executive session.

Depending upon how you define your process at the start of your search, the “initial screening” may include the review by the “search committee” and initial interviews. Some processes use an independent search committee while others use subcommittees of the School Committee or the full Committee itself. If you have combined the initial screening with interviews, that stage may be held in executive session by a search committee. However, all subsequent steps in the process must be held in open session.

You may make your process more open than the law allows. Many School Committees wisely define clearly what the steps in the process will be so there is no doubt about the roles of the participants and the public visibility of the various stages. One School Committee set up a community screening committee and provided that all sessions would be held in public. The screening committee made up of board members and others, ignored this directive and used the language of the law to justify convening in executive session for interviews of candidates. The entire interview process had to be scrapped and started from the beginning because the School Committee’s policy of open sessions had been violated.

#### **4. Post Your Vacancy Internally**

Some union contracts require that you post vacant positions internally. While there may be disagreement about your obligations to involve your employee unions in your search or to post the notice of the vacant superintendency, it is a good idea to circulate the notice of vacancy and job posting as you would any other internal position.

## **MASC MEMBERS MAY RECEIVE THESE SERVICES WITHOUT FEE AS PART OF THEIR BASIC MEMBERSHIP:**

- Rapid Response to your questions and concerns for all aspects of superintendent searches including advice and guidance for planning your search, recruiting, setting up your interviews and site visits.
- Assistance in finding an interim superintendent (if necessary)
- Technical guidance from your field director on search processes and protocols after you've started
- Search strategizing before and after problems arise
- Hosting community meetings/focus groups/brainstorming
- Posting your vacancy on our Web Site
- Distribution of your vacancy notice to our 52-member NSBA network of state school boards associations
- Assistance to districts doing their own searches, reaching out to our 1400 person recruiting list of potential candidates and contacts. \*
- Ability to check references with our colleagues across America
- Guidance on where and how to post advertising.
- Assistance on public relations issues related to your search.
- Orientation of your Search Committee including guidance on Open Meeting Law and other applicable laws and regulations
- Assistance with troubleshooting issues (e.g., media, advertising, problem candidates, glitches)
- Background materials on job descriptions and position profiles
- Assistance in developing excellent questions for candidates from the school committee member's perspective.
- Assistance in organizing site visits.
- Assistance in contracting.
- Follow-up workshops to help build team work and appreciation of the Superintendent/School Committee relationship.
- The full roster of resources of MASC.

\* Mailing list information is available only to districts that are doing their own searches, and not to external search consultants.

## SHOULD WE EMPLOY A SEARCH CONSULTANT

Search consultants can be an invaluable resource for School Committees seeking a new superintendent. Consultants bring certain resources and advantages including:

- Special contacts that enhance their ability to recruit from a larger or national base of candidates, or a more diverse talent pool.
- Experience with search management, including reference checking.
- Ability to handle all administrative details.
- Ability to maintain confidentiality by securing all paperwork during and after the search.

Not all consultant experiences are happy ones. For example:

- Consultants may not be at your side at every critical step such as being in attendance at resume screenings, semi-finalist or finalist interviewing, or at strategy or planning meetings.
- High consulting fees can bring public criticism, especially if your search ends up with candidates whom you would have recruited or who would have found you anyway.
- Consultants may not understand or follow the Massachusetts Open Meeting Law, a problem that may result in the Attorney General getting involved in your search process or the media embarrassing you.
- Consultants may be less skillful at dealing with the public, the politics, and the media than in administering the technical elements of a search.
- Consultants may work with a stable of candidates they move into many of their searches, including concurrent ones, often to enlarge the pool rather than to improve the quality of prospective superintendents. You should also ensure that your consultant will inform you of any such circumstances, including situations where they are representing the same candidate(s) in more than just your search.
- Consultants may represent a special perspective – and not necessarily that of your School Committee. The appropriate role of the School Committee vis-a-vis the superintendent is one involving ongoing discussion and debate and there are several areas where the law and practice are ambiguous or contentious. Several firms deploy retired superintendents who understand and advance the chief executive's perspectives, and not necessarily those of the School Committee. Others may retain current or former school board members to incorporate (or give the appearance of incorporating) your own concerns.
- Consulting firms may use the search process as a vehicle to pressure the superintendent they recruit into hiring them subsequently for future consulting services.
- In a few years, your consultant may recruit your superintendent for another community's search.

If you retain a search consultant, keep these points in mind:

- You're the School Committee. Do not lose control of your search to a consultant. Make sure the search is conducted under terms with which you are comfortable and that work for you and your needs.
- Identify all charges and fees ahead of time and clarify any additional costs for expenses that cannot be identified at the start.
- Make sure you determine who will be involved at the appropriate stages of the search. A consultant should be flexible enough to accommodate your special concerns regarding process and other steps in the search.
- Ensure that you have a clearly explained recruitment plan.
- Ask your consultant if they have a stable of candidates on hand or if they will be recruited anew. Ask how the candidates were recruited, especially if you suspect that candidates are being shopped around.
- Ask your consultant how they will handle a situation in which the same consultant represents the same candidate in more than one search.
- Interview your superintendent-candidates with questions that get at your district's needs and that draw out substantive responses. Do not accept a checklist of pre-developed questions that have been handed to you.
- Learn how the consultant will check references carefully.
- Go on site visits to assess your candidates in the light of their current settings. You may wish your consultant to accompany you, but you should never relinquish your own participation in a site visit to a consultant, nor let the consultant determine your itinerary.
- DO NOT relinquish control over the superintendent contracting process, including contract negotiations, to your consultant. Collaborate if you choose to allow the consultant to be involved in the negotiations, but remain in charge. You must live with the contract, including salary and benefit package. Your consultant should never make commitments to a candidate, nor negotiate, formally or informally, without your specific authorization and detailed instructions.
- Make sure you have an agreement in place about how you will handle a failed search, i.e., one where your finalists withdraw or where you cannot find a suitable candidate. You should arrange ahead of time both how this should be handled and how each party will explain its efforts to the public. Do not allow your consultant to point the finger at you – the client, especially if the response was poor, candidates weak, or withdrawal of individuals leaves you stranded.





## **Edward J. Collins, JR Center for Public Management**

John W. McCormack Graduate School of Policy and Global Studies

University of Massachusetts Boston

100 Morrissey Boulevard, Boston, MA 02125-3393

Web page: [www.umb.edu/cpm](http://www.umb.edu/cpm) Email: [collins.center@umb.edu](mailto:collins.center@umb.edu) Phone: 617-287-4824

September 3, 2026

Buckner Creel

Acting Director for Business & Human Resources

40 Fairbank Road

Sudbury, MA 01776

Dear Mr. Creel,

The Edward J. Collins, Jr. Center for Public Management, is pleased to present this proposal to Sudbury Public Schools to assist with the recruitment for the position of Superintendent of Schools. Please note the scope is a DRAFT and will be revised as necessary to meet the specific needs, preferences, and process of the District.

The Center was established in 2008 in the McCormack Graduate School of Policy and Global Studies to further the public service mission of the University of Massachusetts Boston. The Center provides technical assistance to municipalities, school districts, and state agencies on all aspects of public management. The Center has assisted many school districts in recruitment efforts.

The Center has conducted more than 100 successful recruitments in Massachusetts for positions such as School Superintendents and Principals, Town Managers, Town Administrators, and key Department Heads. We understand that the manner in which a search is conducted as well as the outcome serves as a signal to residents of the District's open, non-political, and transparent approach to governance. Our approach is collaborative and inclusive.

The recruitment Project Manager will be Mary Flanders Aicardi. Mary leads the Center's Human Resources practice. She has been with the Center for more than 16 years and has 30 years of public sector human resources and labor relations experience. The Team will include William Lupini, Senior Associate, who has served over 25 years as Superintendent, and Marie Altieri, Associate, who has served as Assistant Superintendent for the Acton Boxborough Public Schools.

As you may know, transactions with the Commonwealth, including the University, are exempt from the provisions of Chapter 30B, the Uniform Municipal Procurement Act (Section 1 (b)(4)). As such, some of the forms required in the RFP contain a notation that they do not apply to the Collins Center. However, the all-inclusive fee for the engagement is contained in a separate email as requested.

Please let us know if you have any questions about this proposal. Thank you for your consideration. Please reach out to Mary Flanders Aicardi via email at [mary.aicardi@umb.edu](mailto:mary.aicardi@umb.edu) with any questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Michael Ward".

Michael Ward, Director

## Table of Contents

|                                                                   |                                     |
|-------------------------------------------------------------------|-------------------------------------|
| Project Approach .....                                            | 3                                   |
| Task One: Project Kick Off Meeting .....                          | 3                                   |
| Task Two: Preparing a Position Profile for Posting .....          | 3                                   |
| Task Three: Networking and Recruitment of Candidates .....        | 4                                   |
| Task Four: Working with a Screening Committee .....               | 4                                   |
| Task Five: Developing Questions .....                             | 4                                   |
| Task Six: Screening, and Presentation of Paper Candidates .....   | 4                                   |
| Task Seven: Preliminary Interviews .....                          | 5                                   |
| Task Eight: Reference Checking .....                              | 5                                   |
| Task Nine: Finalist Forums with Community and Staff - Option..... | 5                                   |
| Task Ten: Guidance on Final Interview and Selection .....         | 5                                   |
| Responsibilities of the Collins Center .....                      | 6                                   |
| Responsibilities of the Sudbury Public Schools .....              | 6                                   |
| Professional Fees, Expenses and Payment Schedule .....            | 6                                   |
| Recruitment Team Biographies .....                                | 7                                   |
| Collins Center Completed Recruitments.....                        | 9                                   |
| Selected References.....                                          | 10                                  |
| Forms .....                                                       | <b>Error! Bookmark not defined.</b> |

## **Scope of Services**

### **Sudbury Public Schools Superintendent Recruitment Assistance**

#### **Project Approach**

The following information is provided to illustrate the Center for Public Management (Center) approach to executive recruitment and what the Center believes are successful outcomes of each stage of a search. The Center believes that a significant risk in selection is choosing the best person from a mediocre pool of candidates. Therefore, the Center's principal effort is directed at giving its clients a pool of well-qualified candidates, thereby reducing this risk.

#### **Task One: Project Kick Off Meeting**

The Center will meet with the School Committee, or designated Sub-Committee, to kick off the project, refine the scope, discuss details and timelines.

#### **Task Two: Preparing a Position Profile for Posting**

The Center project team begins the search with a simple question: What criteria would the organization use to determine that the appointment was successful? A common statement is that when organizations choose a leader, they choose a path. The Center project team needs to understand the path that District wishes to follow in order to identify and recruit a pool of candidates that can meet its needs.

**School Committee Interviews:** The project team will individually interview each School Committee member to gain insight, understand, and document the major challenges and opportunities facing the District. The project team can then determine what type of experience, technical skills, and personal attributes candidates will need to be effective in the position. In addition, the Center will use information gathered from the administration, including information from, budgets, goals, and priorities that have been developed by the School Committee, to provide a true picture of the position to be used for recruitment purposes and guidance for the Screening Committee.

**Input from the School Community:** The recruitment team will receive input from community members and staff asking them their opinions about the challenges facing the next Superintendent, priority issues, and characteristics to look for in selecting the next Superintendent. The input will be gathered in two ways and will be summarized for use by the School Committee and incorporated in the Position Profile.

**Focus Groups.** The Center will facilitate up to six in person input (focus group) meetings. The questions asked will be the same as those asked in the survey.

**Outcome:** A Position Profile Statement will be prepared for the Schools Committee's acceptance. Once accepted, the Profile will be used as the foundation for advertising and recruitment efforts.

### **Task Three: Networking and Recruitment of Candidates**

The position will be advertised with a variety of websites and organizations, with particular attention to avenues to recruit a diverse pool of candidates. At the same time, the recruitment team engages in extensive direct networking and recruiting using the Center's broad network and personal contacts. The Center has had engagements with more than 280 of the Commonwealth's 351 municipalities. Often the best person for a job is not looking for a job, which is why our direct networking is a critical part of the process. The Center's approach is to find candidates that have faced challenges that are of similar magnitude and complexity to those faced by the District. The Center will forward all resumes to the Screening Committee.

**Outcome: At the conclusion of networking, the Center will compile resumes to be presented to the Screening Committee. The Screening Committee will receive copies of all resumes submitted.**

### **Task Four: Working with a Screening Committee**

The Center will advise the School Committee on the composition of a Screening Committee and provide a sample Screening Committee Charge to approve and issue to the appointed Screening Committee. The Screening Committee Charge helps clarify the role of members in their role in screening candidates and forwarding potential finalists to the School Committee.

While the position is being posted, the Center will meet with the Screening Committee to plan the review process. The Center will provide guidance to the Screening Committee on issues of confidentiality and avoiding social media searches.

The cause of most delay is scheduling meetings with the Screening Committee. Often the people most willing to serve on a committee are the ones with the busiest schedule. It will be important for the Screening Committee to be made aware of the timeline and be available.

### **Task Five: Developing Questions**

The Center will assist the Screening Committee in establishing a set of standardized questions to be asked of all candidates, in accordance with MCAD guidelines and will work with the Screening Committee to determine the logistics of interviews. The questions will be developed by using the Position Profile created by the School Committee. The questions will be finalized by the Screening Committee prior to the review of applications.

**Outcome: A set of standardized questions to be asked of all candidates will be developed in accordance with the Position Profile approved by the School Committee and the Screening Committee Charge.**

### **Task Six: Screening, and Presentation of Paper Candidates**

After the deadline, the Center will provide a confidential link to Screening Committee members including all resumes received. The Center does not screen out candidates. Along with the resumes, a summary Table will be shared for easy reference. The Center asks each screening committee member to answer yes,



maybe, or no to the question “do you want to interview this candidate.”

The Center recommends and uses a consensus approach to deliberations of candidates to determine which candidates to invite for a preliminary screening interview. Doing so encourages discussion and allows for support of those candidates moving forward without a “score” and enables candidates from non-traditional and diverse backgrounds to be evaluated fairly.

**Outcome. Candidates to be invited for a preliminary interview will be identified.**

## **Task Seven: Preliminary Interviews**

After candidates are selected for a preliminary interview, the recruitment team will schedule and facilitate the preliminary interviews with the Screening Committee. At the conclusion of the interviews, the recruitment team will facilitate the deliberations to identify candidates to be moved to the next phase of the process to become potential finalists. Like the review of resumes, a consensus approach is taken to determine which candidates to advance to the next round of the process. (NOTE: The School Committee determines finalists, after references).

**Outcome: Screening committee will identify potential finalists.**

## **Task Eight: Reference Checking**

Reference checks are extremely thorough. After receiving a signed release, the recruitment team will speak with employers, professional peers, and subordinates, systematically posing the same questions.

**Outcome: The Center will provide a summary of references to the School Committee.**

## **Task Nine: Finalist Forums with Community and Staff - Option**

If desired, the recruitment team will work with the School Committee to determine the schedule for holding public forums for finalists. The project team will participate in facilitating the forums. It is anticipated that each candidate will make a brief presentation and then take questions as part of each session. At the beginning of each session, the project team will collect questions to be asked from participants ahead of time to streamline the process. The recruitment team will provide attendees with a brief feedback form that will be collected at the end of each forum. The District will be responsible for providing interpreters and translation of any materials or feedback forms.

**Outcome: A summary of the forum feedback will be provided to the School Committee to be used in final deliberations.**

## **Task Ten: Guidance on Final Interview and Selection**

The recruitment team will help the School Committee plan the final interview process by providing guidance with the process and structuring the discussion, questions, and format. The recruitment team will be available to provide technical assistance with logistics and deliberation assistance at the final

interviews. The recruitment team is available to work to clarify issues, establish a framework, and facilitate communication, negotiating conditions of employment is the sole responsibility of the School Committee.

**Outcome: A well-organized final interview and selection process.**

## **Responsibilities of the Collins Center**

The Center project team will act at all times in an attentive, ethical, and responsible manner. The Center will assign a Mary Flanders Aicardi as the project manager, who will serve as the primary point of contact for the duration of the project. The project team will also include Dr. William Lupini, Senior Associate and Monica Visco, Associate.

Throughout the course of the project, the project manager shall facilitate completion of work and communicate with the client project liaison to discuss and resolve any issues with the timeline and to consider proposed modifications to the timeline.

## **Responsibilities of the Sudbury Public Schools**

The District will identify a project liaison to the Center for the duration of the work. The project liaison will have responsibility for communicating the process of the project to and for managing logistics throughout the project (e.g., scheduling and posting meetings, identifying meeting space, advertising forums, distributing surveys, providing translation and interpretation services, as well as having ownership and responsibility for any online meetings, web page postings, etc.). The District will also be responsible for any site-visit tours of finalists. If requested, the Center can provide facilitation services at public forums to greet the finalists.

The Sudbury Public Schools shall agree to provide necessary access to its employees, records, and agreed-upon data, and to respond to requests for information, comment, and scheduling in a timely manner.

The project liaison will work with the Center project manager to discuss and resolve any issues with the timeline and to consider any proposed modifications to the timeline. For all steps in the workplan, delays in the schedule, requests for expansion of scope, or other significant unforeseen developments may lead to a renegotiation of scope, timeline, cost, or all three.

## **Professional Fees, Expenses and Payment Schedule**

The all-inclusive professional fee is contained in a separate correspondence. The fee does not include screening committee expenses, such as food and refreshments, or any candidate expenses. The payment schedule is as follows:

- half when position recruitment materials are posted
- half when project is complete

**Optional:** Each additional forum, which includes two project team members, will incur an additional fee

## **Recruitment Team Biographies**

### **MARY FLANDERS AICARDI, MPA, HUMAN RESOURCES PRACTICE LEADER**

Mary Aicardi leads the human resources practice. She has been with the Center since 2009 and has more than thirty years of experience in public sector human resources administration and labor relations to the Collins Center. She served for more than eight years as the Personnel Director for the town of Watertown, Massachusetts, as the Interim Human Resources Director for the Town of Braintree, the Assistant Personnel Director for the Town of Barnstable and as a Volunteer Recruiter for a non-profit agency.

Aicardi has conducted more than 100 recruitments for the Collins Center and dozens more for other entities. She has conducted human resources audits and has reviewed and modernized classification and compensation plans for more than 150 municipalities. She has drafted numerous human resource policies and personnel plans. Aicardi has conducted training programs on a wide range of human resources topics, including leadership training, performance appraisal, progressive discipline, and sexual harassment prevention.

Aicardi holds a master's degree in public administration and a bachelor's degree in political science from the University of Massachusetts at Amherst. She is certified by the Massachusetts Commission Against Discrimination as a trainer of discrimination and sexual harassment prevention and received a Certification from Cornell University in Diversity Equity and Inclusion. Mary is a member of the Joint Labor Management Committee and served nine years as an elected Town Meeting Member in her hometown of Shrewsbury.

### **WILLIAM H. LUPINI, Ed. D, SENIOR ASSOCIATE**

Dr. Lupini has worked as a school superintendent for over 25 years, having held the position in Massachusetts, New Hampshire, and Pennsylvania, with the majority of that time spent with the Public Schools of Brookline and the Beverly Public Schools. These experiences have taken place in cities, towns, and regional school districts, as well as career and technical schools and educational collaboratives. He has also served as a Director of Curriculum and Instruction, Assistant High School Principal, Program Specialist with the New Jersey Department of Education, and a Marketing Education Teacher.

Bill served as President of the Massachusetts Association of School Superintendents (MASS) and the Minority Student Achievement Network (MSAN) Governing Board. He was the 2015 Massachusetts "Superintendent of the Year" nominee. He has served on several statewide working groups in Massachusetts, including the Special Commission on Education Collaboratives, the Commission on Achievement Gaps, and the Next Generation MCAS Procurement Review Team.

Dr. Lupini has had diverse experiences in negotiating and designing educator evaluation systems, having done so in four (4) different school systems. He has a passion for leadership development, including coaching leaders in multiple school systems. He has extensive experience utilizing facilitative leadership, tight coupling, and defined autonomy to improve the performance of leadership teams and relationships

between central office and building principals. In addition, he has led efforts to revamp special education services, including implementing cost saving measures while increasing services for students.

Bill teaches school law and other educational administration courses in several programs for aspiring administrators. Bill holds a Doctor of Education degree in Educational Leadership and Administration from Lehigh University, a Master of Education degree in Leadership, Administration, and Supervision from Rider University, and a Bachelor of Science Degree in Marketing and Business Education from Indiana University of Pennsylvania.

#### **MARIE ALITIERI**

Marie Altieri joined the Human Resources Practice of the Collins Center in 2024 after serving as the Deputy Superintendent of Schools for the Acton-Boxborough Regional School District for 16 years. In this role, Marie oversaw human resources, student registration, and she negotiated several collective bargaining agreements. Marie has served on several school and municipal building committees, a Health Insurance Trust, and she served for seven years on her local Regional School Committee. Marie's previous experience includes teaching in school and corporate settings, including Northeastern's Corporate Education, adult software and systems courses, and Middle School Instructional Technology and Mathematics. Marie has a M.Ed. from Boston University and a BS degree in Computer Science and Mathematics from Merrimack College.



## COLLINS CENTER COMPLETED RECRUITMENTS

|                                         |                                                     |
|-----------------------------------------|-----------------------------------------------------|
| Current: Acton Boxborough Regional      | Superintendent Recruitment                          |
| Minuteman Regional Voc Technical School | Superintendent Recruitment                          |
| Lincoln                                 | Superintendent Recruitment                          |
| Norfolk                                 | Principal Recruitment                               |
| Revere                                  | High School Administrators Search Assistance        |
| Cambridge Public Schools                | Exec. Dir. of Career and Technical Education - RSTA |
| Center for Collaborative Education      | Leadership Recruitment                              |
| Duxbury                                 | Superintendent Recruitment                          |
| Center for Collaborative Education      | Leadership Recruitment                              |
| Malden                                  | Superintendent Recruitment                          |
| Somerville                              | High School Principal Recruitment                   |
| Weymouth Public Schools                 | Superintendent Recruitment                          |
| Cambridge                               | Assistant Superintendent Recruitment                |
| Melrose Public Schools                  | Superintendent Recruitment                          |
| Salem Public Schools                    | Superintendent Recruitment                          |
| Beverly Public Schools                  | Schools Superintendent Recruitment                  |
| Chelsea                                 | School District Superintendent Recruitment          |
| Cohasset                                | Schools Superintendent Recruitment                  |
| EDCO Collaborative                      | Executive Director Recruitment                      |
| Salem Public Schools                    | Executive Dir. of Pupil Personnel Recruitment       |
| Sudbury Public Schools                  | Superintendent Recruitment                          |
| Somerville                              | High School Principal Recruitment                   |
| Westport Public Schools                 | Superintendent Recruitment                          |
| Salem Public Schools                    | Principals Recruitment (4)                          |

## **Selected References**

Please feel free to contact any former client. The following are a representative group

|                                                                                                                                             |                                                                                                                                                        |
|---------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Kim Rajdeve Vice-Chairperson<br>Lincoln School Committee<br><a href="mailto:schoolcomm@lincnet.org">schoolcomm@lincnet.org</a>              | Mayor Gary Christenson, Chair<br>Malden School Committee<br><a href="mailto:mayor@cityofmalden.org">mayor@cityofmalden.org</a>                         |
| Lisa Belmarsh, Chair<br>Weymouth School Committee<br><a href="mailto:Lis.belmarsh@weymouthschools.org">Lis.belmarsh@weymouthschools.org</a> | Margaret Raymon Driscoll, Chair<br>Melrose School Committee<br><a href="mailto:Eoconnell@cityofmelrose.org">Eoconnell@cityofmelrose.org</a>            |
| Jeannett Velez, Former Chair<br>Chelsea School Committee<br><a href="mailto:Velez.jeanny@gmail.com">Velez.jeanny@gmail.com</a>              | Kris Silverstein, Former President<br>Beverly School Committee<br><a href="mailto:Ksilverstein@veverlyschools.org">Ksilverstein@veverlyschools.org</a> |
| Lucie St. Goerge, Former School Committee<br>Member<br>Sudbury Public Schools<br><a href="mailto:Lstgeo@verizon.net">Lstgeo@verizon.net</a> | Diana Fisher Gomberg, Chair<br>School Committee of Directors<br>EDCO Collaborative<br><a href="mailto:dfgomberg@gmail.com">dfgomberg@gmail.com</a>     |

## **Forms**

### **Attachment C – certification of Good Faith and Non Collusion**

The Collins Center for Public Management is a Center within the McCormack School of Government at the University of Massachusetts – Boston. It is a governmental entity. The Center always acts in Good Faith and does not collude with other organizations; and complies with all Tax Regulations. The Federal Tax ID number can be provided if a contract is entered into with the District. The individual center within the University is not authorized to provide at this time but can if required.

### **Reference Forms**

See above

### **Signatures**

As indicated, see above. The Center is not an individual, a co-partnership or a corporation. It is a governmental entity in Massachusetts.

### **Organizational Chart**

As a Center within the organization, the organizational chart is not as clear as many others. The Center has practice areas. However, the structure is as follows:

- Executive Director – Michael Ward
- Director of Municipal Services – Sarah Concannon
- Human Resources Practice Leader – Mary Aicardi
- Part time Associates: The Center has close to 50 part-time associates practicing across practice areas. Mr. Lupini and Ms. Altieri are Associates.

The Center has other practice areas including Finance; Organizational Development; Innovation and Efficiency; Charter and Statutory Structure. Each practice area has sub practice areas. For example, Human Resources has policy review, recruitment, professional development, succession planning, organizational review, etc.

### **Contact**

Please do not hesitate to reach out to Mary Flanders Aicardi, HR Practice Leader, with any questions or need for clarifications. Thank you.



## Edward J. Collins, JR Center for Public Management

John W. McCormack Graduate School of Policy and Global Studies

University of Massachusetts Boston

100 Morrissey Boulevard, Boston, MA 02125-3393

Web page: [www.umb.edu/cpm](http://www.umb.edu/cpm) Email: [collins.center@umb.edu](mailto:collins.center@umb.edu) Phone: 617-287-4824

September 3, 2026

Buckner Creel

Acting Director for Business & Human Resources

40 Fairbank Road

Sudbury, MA 01776

Dear Mr. Creel,

The all included Price Proposal for the services to assist the Sudbury Public Schools is \$24, 000.

As indicated in the technical proposal, amendments can be made to the scope of work, and additional services can be provided.

Please let us know if you have any questions about this proposal. Thank you for your consideration. Please reach out to Mary Flanders Aicardi via email at [mary.aicardi@umb.edu](mailto:mary.aicardi@umb.edu) with any questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Michael Ward".

Michael Ward, Director

### Professional Fees, Expenses and Payment Schedule

The fee does not include screening committee expenses, such as food and refreshments, or any candidate expenses. The payment schedule is as follows:

- half when position recruitment materials are posted
- half when project is complete

**Optional:** Each additional forum, which includes two project team members, will incur an additional fee



**Sudbury Public Schools  
School Committee Meeting**

**Date:** **September 14, 2026**

**Agenda Item:** 4g - Policy BDB: Step 1: Informational Only

- i. JLCD Administration of Medication of Students
- ii. JLCDC Self Administration and Self-Carry of Medication
- iii. JKAA Prevention of Physical Restraint of Students
- iv. ACL PROTECT Act

**Recommendation:**

**Background / Preparation Information:**

Policy BDB states that we will review policies at the full committee using a three-step process. We are on step 1 – Informational only for the policies listed below. These are meant to be reviewed by the Committee and any interested community member. I do not anticipate a vote on these policies during this meeting. You will be seeing these policies again on our next agenda and we will be discussing them in detail then.

**Attachments:**

- 1 - MEMO Regarding Policy Sub Vote and Next Steps
- 2 - Policy BGB - Policy Adoption
- 3 - Current Policy JLCD
- 4 - Redlined JLCD
- 5 - DRAFT JLCD – Administration of Medication to Students - Clean.docx
- 6-New - DRAFT JLCDC – Self-Administration and Self-Carry of Medication
- 7-DRAFT JKAA Restraint Prevention Policy (1)
- 8-K-12Guidance
- 9-MASC-DRAFT-protect-act-Policy-Clean-v2 (2).docx

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

## **MEMO**

**To:** Sudbury School Committee

**From:** Karyn Jones, Policy Subcommittee

**Re:** JLCD, Administration of Medication to Students and JLCDC, Self-Administration and Self-Carry of Medication

**Date:** August 15, 2026

At its August 13, 2026 meeting, the Policy Subcommittee voted to recommend the following two draft policies for consideration and adoption by the School Committee:

- DRAFT JLCD – Administration of Medication to Students
- DRAFT JLCDC – Self-Administration and Self-Carry of Medication

MASC updated JLCD and developed the new JLCDC following changes to 105 CMR 210, the Massachusetts Department of Public Health regulations governing medication administration in schools. The policies are designed to work together: JLCD addresses the administration of medication to students, while JLCDC provides a separate policy governing student self-administration and self-carry.

### **JLCD – Administration of Medication to Students**

The School Committee most recently adopted JLCD on March 16, 2026. The recently updated MASC policy covers many of the same areas as our current policy but provides significantly more detail regarding how the requirements of 105 CMR 210 apply in practice.

Some of the more significant additions and clarifications include:

- **Regular School Activities:** The updated policy makes clear that medication requirements apply not only during the instructional day, but also during field trips and overnight trips, school transportation, interscholastic athletics, after-school and extracurricular activities, and school-sponsored social events.
- **Medication Administration Plans:** Our current policy requires a medication administration plan. The updated policy specifies what must be included in that plan, including the medication order, caregiver authorization, allergies, possible side effects and adverse reactions, storage requirements, monitoring, and identification of any unlicensed personnel authorized to administer the medication.
- **Documentation:** The updated policy provides more detail about what must be documented when medication is administered or omitted, including the dose, date and time, reason for an omission, any adverse reaction, and any action taken.
- **Field Trips and Special Events:** The updated policy specifically addresses medication administration during field trips and other short-term school events and clarifies the school nurse's decision-making authority regarding nursing coverage, delegation, or a combination of the two.
- **Delegation:** Our current policy permits medication administration to be delegated to unlicensed school personnel when allowed by state regulations. The updated policy provides more detail regarding the selection, training and supervision of those individuals.
- **Emergency Medications:** The updated policy provides additional direction regarding emergency medications and the requirements that apply when medication administration is delegated.

- **DPH Registration:** The updated policy more clearly identifies registration requirements that apply when medication is stored at school or medication administration is delegated to unlicensed school personnel.

Although JLCD was recently adopted, the Policy Subcommittee believes the MASC update provides greater clarity and a more complete policy for the District's medication administration practices. The Subcommittee also kept in mind SEPAC's feedback on the policy adopted in March, including its concern that the policy did not provide enough specificity in certain areas. For that reason, the additional detail in the MASC policy was viewed as a benefit. As noted below, while preparing this memo I realized that one specific issue SEPAC raised in March regarding glucagon had not been discussed during the Subcommittee's review. I have since asked the administration and nursing staff to provide feedback on that question during Step 2. The Subcommittee also looks forward to SEPAC's feedback on the proposed drafts as they move through the full Committee's three-step policy adoption process.

### **JLCDC – Self-Administration and Self-Carry of Medication**

JLCDC would be a new policy for Sudbury and is intended to work alongside the updated JLCD.

Our current JLCD includes some provisions related to self-administration and self-carry. It specifically addresses inhalers for students with asthma or other respiratory diseases, enzyme supplements for students with cystic fibrosis, glucose monitoring and insulin delivery systems for students with diabetes, and epinephrine for students with life-threatening allergies.

The new JLCDC provides a separate and more complete policy governing when and how a student may be permitted to self-administer and/or carry medication. It also specifically addresses students with seizure disorders and seizure rescue medications, which are not specifically identified in our current JLCD.

Rather than addressing self-administration through a limited list of exceptions within the District's general medication policy, JLCDC provides clearer guidance regarding student self-administration and self-carry and the role of the school nurse in that process.

*In short, JLCD addresses the District's administration of medication to students, while JLCDC addresses student self-administration and self-carry of medication.*

Because MASC developed the updated JLCD and new JLCDC together following the changes to 105 CMR 210, the Policy Subcommittee recommends adoption of the two policies together.

### **Feedback from Student Services and SPS Nurses**

The Director of Student Services attended the August 13 Policy Subcommittee meeting and participated in the discussion of both policies. She supports adoption of the updated JLCD and the new JLCDC and shared that she had also discussed the policies with SPS nurses.

SPS nurses are also supportive of adopting both policies and believe the additional detail provides greater clarity regarding medication administration, self-administration and self-carry, and staff responsibilities.

### **Next Steps**

The proposed policies will now move through the School Committee's regular three-step policy adoption process under Policy BGB: Information, Discussion and Action. The process is intended to provide time for review, feedback and any necessary revisions before final adoption.

In my role as the School Committee's liaison to SEPAC, I have also provided both draft policies to SEPAC so that it has an opportunity to review them and provide feedback to the Committee during Step 2, if it wishes to do so.

While preparing this memo, I noticed that the proposed policies do not specifically reference glucagon. When the Committee reviewed JLCD in March, SEPAC raised a concern that the policy did not specifically reference certain emergency rescue medications addressed by the revised 105 CMR 210, including certain forms of glucagon used in severe hypoglycemic emergencies. This specific issue was not discussed at the August 13 Policy Subcommittee meeting.

I have emailed the Interim Superintendent and Director of Student Services to ask whether the proposed JLCD and JLCDC adequately address this provision or whether additional language should be considered. I have asked that administration and nursing staff provide feedback during Step 2 so that the Committee can consider any recommended change before final adoption.

**Enclosures**

1. Policy BGB, Policy Adoption
2. Current Policy JLCD
3. Redlined JLCD
4. DRAFT JLCD – Administration of Medication to Students - Clean
5. *New* - DRAFT JLCDC – Self-Administration and Self-Carry of Medication



## **File: BGB - POLICY ADOPTION**

Adoption of new policies or changing existing policies is solely the responsibility of the School Committee. Policies will be adopted and/or amended only by the affirmative vote of a majority of the members of the School Committee when such action has been scheduled on the agenda of a regular or special meeting.

To permit time for study of all policies or amendments to policies and to provide an opportunity for interested parties to react, proposed policies or amendments will be presented as an agenda item to the Committee in the following sequence:

1. Information item - distribution with agenda
2. Discussion item - reading of the proposed policy or policies; response from Superintendent; report from any advisory committee assigned responsibility in the area; Committee discussion and directions for any redrafting
3. Action item - discussion, adoption or rejection.

Amendments to the policy at the action stage will not require repetition of the sequence, unless the Committee so directs.

The School Committee may dispense with the above sequence to meet emergency conditions.

Policies will be effective upon the date set by the School Committee. This date will ensure that affected persons have an opportunity to become familiar with the requirements of the new policy prior to its implementation.

## **Current Policy**

### **File: JLCD - ADMINISTERING MEDICINES TO STUDENTS**

The School District Nurse Leader is designated as the supervisor of the district medication administration program. The School District Nurse Leader, in consultation with the School Physician, shall recommend procedures to be adopted by the Sudbury School Committee that include the following:

- documentation of the administration of medications;
- response to a medication emergency;
- storage of medications;
- reporting/documentation of medication errors;
- dissemination of information to parents/guardians (including an outline of the District's medication policy);
- procedures for resolving questions/disagreements between the school and a parent/guardian regarding medication administration.

It is the district policy that medication may not be administered to students while at school unless such medicine is given to them by the school nurse acting under specific written request of the parent or guardian and under the written orders of the student's personal physician, with the exception of certain medications which may be self-administered by the student after approval by the school nurse and in consultation with the parent/guardian and the student's physician. If a student has been approved for self-administration and self-carry, a student who needs medication during the school day may be reminded to take the medicine by the school nurse or other individual designated by the school nurse in the student's medical administration plan. This provision only applies when the school nurse has a medical administration plan in place for the student. No one but the school nurse, and those others listed in the medical administration plan acting within the above restriction, may give any medication to any student.

### **Exceptions:**

The school district shall, through the School District Nurse Leader, register with the Dept. of Public Health and train personnel in the use of epinephrine auto-injectors. The School District Nurse Leader will develop a written protocol which complies with medical directives and regulations from the Dept. of Public Health.

The school district will, in conjunction with the School Physician and the School District Nurse Leader, stock nasal naloxone (Narcan) and trained medical personnel and first

responders may administer nasal naloxone to individuals experiencing a life-threatening opiate overdose in a school setting. The School District Nurse Leader will develop a written protocol which complies with medical directives and regulations from the Dept. of Public Health.

The District will permit delegation by the School Nurse of medication administration to unlicensed school personnel only if the District registers with the Massachusetts Department of Public Health (DPH) pursuant to applicable regulation, and complies with the requirements of 105 CMR 210.004.

Following consultation with the school nurse, students who fall into the following exceptions may self-carry and self-administer the following medications:

1. Students with asthma or other respiratory diseases may possess and administer prescription inhalers.
2. Students with cystic fibrosis may possess and administer prescription enzyme supplements.
3. Students with diabetes may possess and administer glucose monitoring tests and insulin delivery systems.
4. Students with life-threatening allergies may possess and administer epinephrine.

The District School Nurse Leader and Superintendent shall monitor compliance with this policy and applicable procedures, periodically review program effectiveness, and report to the School Committee.

The policy and procedures shall be reviewed at least every two years, and whenever required by changes in law/regulation or District practice.

#### REFERENCES:

105 CMR 210.00 et seq.

*Approved by the Sudbury School Committee on March 16, 2026*

## Current Policy

### **DRAFT** - ADMINISTERING MEDICINES TO STUDENTS

File:- JLCD

Medication may not be administered to students during Regular School Activities unless there is a medical administration plan in place for the student. Regular School Activities means all instructional/academic activities, as well as all activities organized or sanctioned by the school including, but not limited to, day and overnight field trips, school-provided transportation, interscholastic sporting events, after school or extracurricular clubs or organizations, and proms or other social events organized as part of the instructional/academic portion of the school.

No one but the school nurse, and those others listed in the medical administration plan may give any medication to any student.

**Exceptions:** The School District Nurse Leader is designated as the supervisor of the district medication administration program. The School District Nurse Leader, in consultation with the School Physician, shall recommend procedures to be adopted by the Sudbury School Committee that include the following:

- documentation of the administration of medications;

The School Committee, consulting with the Board of Health where appropriate, shall adopt policies and procedures governing the administration of medications and self-administration of medications within the school system, following development of a proposal by the medication program manager, in consultation with the school physician. Review and revision of such policies and procedures shall occur as needed but at least every two years.

At a minimum, these policies shall include:

1. designation of a medication program manager supervisor of the medication administration program in a school;
2. documentation of the administration of medications, including the requirement that each school maintains a medication administration record for each student who receives medication during regular school activities; The school nurse shall document in the medication administration record significant observations of the prescription medication's effectiveness, as appropriate, and any adverse reactions or other harmful effects, as well as any action taken. All documentation shall be recorded in a manner that prevents alteration or destruction of the record. Documentation shall include but not be limited to a daily log and a medication administration plan.
  - The daily log shall contain:
    - (a) the dose or amount of medication administered;
    - (b) the date and time of administration or omission of administration, including the reason for omission and action taken post omission;
    - (c) mechanism for identifying the person administering each dose, including the medication order and caregiver authorization.
  - The medication administration plan shall include:

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- (a) the name of the student;
- (b) a medication order from a licensed prescriber, which meets the requirements of 105 CMR 210.005(D)(1);
- (c) the signed authorization of the caregiver, which meets the requirements of 105 CMR 210.005(D)(3);
- (d) any known allergies to food or medications;
- (e) the diagnosis, unless a violation of confidentiality or the caregiver or student requests that it not be documented;
- (f) any possible side effects, adverse reactions or contraindications.
- (g) the quantity of prescription medication to be received by the school from the caregiver;
- (h) the required storage conditions;
- (i) the duration of the medication order;
- (j) the designation of unlicensed school personnel, if any, who will administer the prescription medication to the student in the absence of the school nurse, and plans for back-up if the designated personnel are unavailable;
- (k) plans, if any, for teaching self-administration of the medication;
- (l) with caregiver permission, other persons, including teachers, to be notified of medication administration and possible adverse effects of the medication;
- (m) when appropriate, the location where the administration of the prescription medication will take place;
- (n) a plan for monitoring the effects of the medication;
- (o) the school nurse has final decision-making authority for the provision of medication administration in the case of field trips and other short-term special school events, which may include nursing staffing, delegation of medication administration, or a combination of nursing staffing and delegation of medication administration.

- 3. response to a medication emergency;
- 4. storage of medications;
- 5. reporting and documentation of medication errors;
- 6. dissemination of information to parents/guardians ~~(including~~ Such information shall include an outline of the District's school's medication policy; policies and shall be available to parents upon request;
- 7. procedures for resolving questions/disagreements between the school and a parent/guardian regarding medication administration. administration of medications. Such procedures shall provide for and encourage the participation of the parents/guardians. Existing procedures for resolution of differences may be used whenever appropriate.

It is the district policy that medication may not be administered to students while at school unless such medicine is given to them by the school nurse acting under specific written request of the parent or guardian and under the written orders of the student's personal physician, with the exception of certain medications which may be self-administered by the student after approval by the school nurse and in consultation with the parent/guardian and the student's physician. If a student has been approved for self-administration and self-carry, a student who needs medication during the school day may be reminded to take the

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medicine by the school nurse or other individual designated by the school nurse in the student's medical administration plan. This provision only applies when the school nurse has a medical administration plan in place for the student. No one but the school nurse, and those others listed in the medical administration plan acting within the above restriction, may give any medication to any student.

Exceptions: The School Committee shall submit these policies and procedures to the Department of Public Health upon request.

The School Nurse/Medication Program Manager, in consultation with the School Physician, may train and delegate responsibility to unlicensed school personnel for medication administration.

1. Neither prescription medication nor over-the-counter medications can be administered by delegation by unlicensed school personnel without student-specific medication orders from a licensed prescriber.
2. The School Nurse/Medication Program Manager has final decision-making authority for the provision of medication administration in the case of field trips and other short-term special school events, which may include nursing staffing, delegation of medication administration, or a combination of nursing staffing and delegation of medication administration.
3. The unlicensed school personnel shall be listed on the medication administration plan, shall be selected by the school nurse, and trained, if they meet criteria established by regulation in the administration of emergency medication to a specific student.

- All unlicensed school personnel administering medication must be properly trained and supervised by a school nurse.
- If epinephrine is administered by unlicensed school personnel, the school nurse, and other individuals as warranted and deemed appropriate by the school nurse, must also be notified.
- If an emergency rescue opioid antagonist is administered, there shall be immediate notification of the local emergency medical services (911), followed by notification of a student's parent/guardian as appropriate, and the school nurse.

The

The school district shall, through the School District Nurse Leader, register with the school district may Dept. of Public Health and train personnel in the use of epinephrine auto-injectors. The School District Nurse Leader will develop a written protocol which complies with medical directives and regulations from the Dept. of Public Health.

The school district will, in conjunction with the School Physician and the School District Nurse Leader, stock nasal naloxone (Narcan) emergency rescue opioid antagonist and trained medical personnel and first responders may administer nasal naloxone to individuals experiencing a life-threatening opiate overdose/overdoes in a school setting. The School District Nurse Leader will develop a written protocol which complies with medical directives and regulations from the Dept. of Public Health. settling

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If the school district wishes medical personnel to train non- medical staff in the administration of emergency rescue opioid antagonist, the School Committee shall vote to approve such training and the Superintendent shall ensure that medical personnel have a written protocol which complies with medical directives and regulations from the Department of Public Health.

Following consultation with the school nurse, students who fall into the following exceptions may self-carry and self-administer the following medications:

1. Students with asthma or other respiratory diseases may possess and administer prescription inhalers.
2. Students with cystic fibrosis may possess and administer prescription enzyme supplements.
3. Students with diabetes may possess and administer glucose monitoring tests and insulin delivery systems.
4. Students with life-threatening allergies may possess and administer epinephrine.

All schools/districts where medication is stored or where medication administration is delegated to unlicensed school personnel must obtain a Massachusetts Controlled Substances Registration by registering with the Department of Public Health. At minimum, schools/districts may accomplish this by registering for emergency medication training.

Schools/districts are not authorized to make use of 105 CMR 700.003(C) for the administration of emergency rescue medications during regular school activities.

SOURCE: MASC – Updated 2026

LEGAL REF.: M.G.L. 71:54B

The District School Nurse Leader and Superintendent shall monitor compliance with this policy and applicable procedures, periodically review program effectiveness, and report to the School Committee of Public Health Regulations;

The policy and procedures shall be reviewed at least every two years, and whenever required by changes in law/regulation or District practice.

#### REFERENCES:

105 CMR 210.00 et seq. & 700.003; 244 CMR 3.0

MDPH Advisory on Application of 105 CMR 210.00 to Field Trips, 2/4/2025

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**File: JLCD****DRAFT - ADMINISTERING MEDICINES TO STUDENTS**

Medication may not be administered to students during Regular School Activities unless there is a medical administration plan in place for the student. Regular School Activities means all instructional/academic activities, as well as all activities organized or sanctioned by the school including, but not limited to, day and overnight field trips, school-provided transportation, interscholastic sporting events, after school or extracurricular clubs or organizations, and proms or other social events organized as part of the instructional/academic portion of the school.

No one but the school nurse, and those others listed in the medical administration plan may give any medication to any student.

**Exceptions:**

The School Committee, consulting with the Board of Health where appropriate, shall adopt policies and procedures governing the administration of medications and self-administration of medications within the school system, following development of a proposal by the medication program manager, in consultation with the school physician. Review and revision of such policies and procedures shall occur as needed but at least every two years.

At a minimum, these policies shall include:

1. designation of a medication program manager supervisor of the medication administration program in a school;
2. documentation of the administration of medications, including the requirement that each school maintains a medication administration record for each student who receives medication during regular school activities; The school nurse shall document in the medication administration record significant observations of the prescription medication's effectiveness, as appropriate, and any adverse reactions or other harmful effects, as well as any action taken. All documentation shall be recorded in a manner that prevents alteration or destruction of the record. Documentation shall include but not be limited to a daily log and a medication administration plan.
  - The daily log shall contain:
    - (a) the dose or amount of medication administered;
    - (b) the date and time of administration or omission of administration, including the reason for omission and action taken post omission;
    - (c) mechanism for identifying the person administering each dose. including the medication order and caregiver authorization.
  - The medication administration plan shall include:
    - (a) the name of the student;
    - (b) a medication order from a licensed prescriber, which meets the requirements of 105 CMR 210.005(D)(1);
    - (c) the signed authorization of the caregiver, which meets the requirements of 105 CMR 210.005(D)(3);
    - (d) any known allergies to food or medications;
    - (e) the diagnosis, unless a violation of confidentiality or the caregiver or student requests that it not be documented;
    - (f) any possible side effects, adverse reactions or contraindications.
    - (g) the quantity of prescription medication to be received by the school from the caregiver;

- (h) the required storage conditions;
  - (i) the duration of the medication order;
  - (j) the designation of unlicensed school personnel, if any, who will administer the prescription medication to the student in the absence of the school nurse, and plans for back-up if the designated personnel are unavailable;
  - (k) plans, if any, for teaching self-administration of the medication;
  - (l) with caregiver permission, other persons, including teachers, to be notified of medication administration and possible adverse effects of the medication;
  - (m) when appropriate, the location where the administration of the prescription medication will take place;
  - (n) a plan for monitoring the effects of the medication;
  - (o) the school nurse has final decision-making authority for the provision of medication administration in the case of field trips and other short-term special school events, which may include nursing staffing, delegation of medication administration, or a combination of nursing staffing and delegation of medication administration.
3. response to a medication emergency;
  4. storage of medications;
  5. reporting and documentation of medication errors;
  6. dissemination of information to parents/guardians. Such information shall include an outline of a school's medication policies and shall be available to parents upon request;
  7. procedures for resolving questions between the school and a parent/guardian regarding administration of medications. Such procedures shall provide for and encourage the participation of the parents/guardians. Existing procedures for resolution of differences may be used whenever appropriate.

The School Committee shall submit these policies and procedures to the Department of Public Health upon request.

The School Nurse/Medication Program Manager, in consultation with the School Physician, may train and delegate responsibility to unlicensed school personnel for medication administration.

1. Neither prescription medication nor over-the-counter medications can be administered by delegation by unlicensed school personnel without student-specific medication orders from a licensed prescriber.
2. The School Nurse/Medication Program Manager has final decision-making authority for the provision of medication administration in the case of field trips and other short-term special school events, which may include nursing staffing, delegation of medication administration, or a combination of nursing staffing and delegation of medication administration.
3. The unlicensed school personnel shall be listed on the medication administration plan, shall be selected by the school nurse, and trained, if they meet criteria established by regulation in the administration of emergency medication to a specific student.
  - All unlicensed school personnel administering medication must be properly trained and supervised by a school nurse.
  - If epinephrine is administered by unlicensed school personnel, the school nurse, and other individuals as warranted and deemed appropriate by the school nurse, must also be notified.
  - If an emergency rescue opioid antagonist is administered, there shall be immediate

notification of the local emergency medical services (911), followed by notification of a student's parent/guardian as appropriate, and the school nurse.

The school district may, in conjunction with the School Physician and the School Nurse Leader, stock emergency rescue opioid antagonist and trained medical personnel and first responders may administer nasal naloxone to individuals experiencing a life threatening opiate overdoses in a school setting

If the school district wishes medical personnel to train non- medical staff in the administration of emergency rescue opioid antagonist, the School Committee shall vote to approve such training and the Superintendent shall ensure that medical personnel have a written protocol which complies with medical directives and regulations from the Department of Public Health.

Following consultation with the school nurse, students who fall into the following exceptions may self-administer medications:

1. Students with asthma or other respiratory diseases may possess and administer prescription inhalers.
2. Students with cystic fibrosis may possess and administer prescription enzyme supplements.
3. Students with diabetes may possess and administer glucose monitoring tests and insulin delivery systems.
4. Students with life-threatening allergies may possess and administer epinephrine.

All schools/districts where medication is stored or where medication administration is delegated to unlicensed school personnel must obtain a Massachusetts Controlled Substances Registration by registering with the Department of Public Health. At minimum, schools/districts may accomplish this by registering for emergency medication training.

Schools/districts are not authorized to make use of 105 CMR 700.003(C) for the administration of emergency rescue medications during regular school activities.

SOURCE: MASC – Updated 2026

LEGAL REF.: M.G.L. [71:54B](#)

Dept. of Public Health Regulations:

105 CMR 210.00 & [700.003](#); 244 CMR 3.0

[MDPH Advisory on Application of 105 CMR 210.00 to Field Trips, 2/4/2025](#)

*Approved by the Sudbury School Committee on [DATE](#).*

**DRAFT SELF-ADMINISTRATION AND SELF-CARRY OF MEDICATIONS**

The school nurse may permit self-carry and self-administration of medication by a student provided that the following requirements are met:

1. the student, school nurse and caregiver, where appropriate, enter into an agreement which specifies the conditions under which medication may be self-administered, which may include the conditions under which a student may self-carry medication for the purpose of administration by another, or whether the medication being self-administered is being taken or applied by the student themselves or with an FDA-approved medical device;
2. the school nurse, as appropriate, develops a medication administration plan pursuant to 105 CMR 210.005(E) which contains only those elements necessary to ensure safe self-administration of medication;
3. the school nurse evaluates the student's health status and abilities and deems self-administration safe and appropriate. As necessary, the school nurse shall observe initial self-administration of the medication;
4. the school nurse is reasonably assured that the student is able to identify the appropriate-medication, knows the frequency and time of day for which the medication is ordered, and follows the school self-administration protocols;
5. there is written authorization from the student's caregiver that the student may self-administer medication, unless the student has consented to treatment under M.G.L. c. 112, § 12F or other authority permitting the student to consent to medical treatment without caregiver permission;
6. if requested by the school nurse, the licensed prescriber provides a written order for self-administration;
7. the school nurse establishes a plan for the safe storage of self-administered medication and, as necessary, consults with teachers, the student and caregiver, if appropriate, to determine a safe place for storing the medication for the individual student, while providing for accessibility if the student's health needs require it. This may include self-carry of the medication and this information shall be included in the medication administration plan. In the case of an inhaler or other preventive or emergency medication, whenever possible, a backup supply of the medication shall be kept in the health room or a second readily available location;
8. the school nurse develops and implements a plan to monitor the student's self-administration, based on the student's abilities and health status. Monitoring may include teaching the student the correct way of taking the medication, and notifying the caregiver or licensed prescriber of any side effects, variation from the plan, or the student's refusal or failure to take the medication;
9. with caregiver and student permission, if required by law, as appropriate, the school nurse may inform appropriate teachers and administrators that the student is self-administering and/or self-carrying a medication.

SOURCE: MASC 2026

Approved by the Sudbury School Committee: **DATE**



## **PREVENTION OF PHYSICAL RESTRAINT OF STUDENTS**

The Sudbury Public Schools complies with the Massachusetts Department of Elementary and Secondary Education's (hereinafter "MA DESE") regulations governing the use of physical restraint, which can be found at 603 CMR 46.00 et seq. (hereinafter "the Regulations"). According to their terms, the Regulations apply at school and also at school-sponsored events and activities, whether or not on school property. Additional information, including a copy of the Regulations, may be obtained from the Student Services Office or at <https://www.doe.mass.edu/lawsregs/603cmr46.html?section=all>.

**PURPOSE.** The purpose of this policy is to ensure that every student attending the Sudbury Public Schools is free from the use of physical restraint that is inconsistent with the Regulations. Towards that end, physical restraint shall be used only in emergency situations of last resort, after other lawful and less intrusive alternatives have failed or been deemed inappropriate, and with extreme caution. School personnel shall use physical restraint with two goals in mind:

- a. To administer a physical restraint only when needed to protect a student and/or a member of the school community from assault or imminent, serious, physical harm; and
- b. To prevent or minimize any harm to the student as a result of the use of physical restraint.

Consistent with the Regulations, nothing in this policy shall preclude a teacher, employee, or agent of the Sudbury Public Schools from using reasonable force to protect students, other persons or themselves from assault or imminent, serious, physical harm or to implement school-based discipline (such as in school suspension) in accordance with due process and state laws/regulations. In addition, nothing in this Policy or the Regulations prohibits law enforcement or school security personnel from exercising their responsibilities, including physical detainment of an individual alleged to have committed a crime or posing a security risk.

### **DEFINITIONS.** (603 CMR 46.02)

**Mechanical Restraint:** the use of any physical device or equipment to restrict a student's freedom of movement.

- Mechanical restraint does not include devices implemented by trained school personnel, or utilized by a student, which have been prescribed by an appropriate medical or related services professional, and are used for the specific and approved positioning or protective purposes for which such devices were designed. Examples of such devices include: adaptive devices

or mechanical supports used to achieve proper body position, balance, or alignment to allow greater freedom of mobility than would be possible without the use of such devices or mechanical supports; vehicle safety restraints when used as intended during the transport of a student in a moving vehicle; restraints for medical immobilization; or orthopedically prescribed devices that permit a student to participate in activities without risk of harm.

Medication Restraint: the administration of medication for the purpose of temporarily controlling behavior.

- Medication prescribed by a licensed physician and authorized by the parent for administration in the school setting is not medication restraint.

Physical Escort: a temporary touching or holding, without the use of force, of the hand, wrist, arm, shoulder, or back for the purpose of inducing a student who is agitated to walk to a safe location.

Physical Restraint: direct physical contact that prevents or significantly restricts a student's freedom of movement.

The following are not physical restraints:

- Brief physical contact to promote student safety.
- Providing physical guidance or prompting when teaching a skill;
- Redirecting attention
- Providing comfort
- Physical escort (as defined above)

Principal: the instructional leader of a public education school program or designee.

Prone Restraint: a physical restraint in which a student is placed face down on the floor or another surface, and physical pressure is applied to the student's body to keep the student in the face-down position. Sudbury Public Schools does not use prone restraints.

Seclusion: involuntary confinement of a student alone in a room or area, with or without adult supervision, from which the student is not permitted to leave. Seclusion occurs when a student is alone in a space and not permitted to leave.

The following are not seclusion:

- A classroom or school environment where, as a general rule, all students need permission to leave the room or area, such as to use the restroom;

- Placing a student in a separate location within a classroom with others or with an instructor, so long as the student has the same opportunity to receive and engage in instruction;
- Time-out as a behavioral support strategy (as defined below)

Time-Out: a behavioral support strategy in which a student temporarily separates from the learning activity or the classroom, either by choice or by direction from staff, for the purpose of calming. During time-out, a student must be continuously observed by a staff member in an unlocked setting from which the student is permitted to leave. Staff shall be with the student or immediately available to the student at all times. Time-out shall cease as soon as the student has calmed.

## **PHYSICAL RESTRAINT PROCEDURES**

### **Use of Restraint (603 CMR 46.03)**

**Physical restraint is an emergency procedure of last resort** and shall be prohibited in public education programs, including all Sudbury programs, **except when** the student's behavior poses a threat of assault, or imminent, serious, physical harm to self and/or others, and the student is not responsive to verbal directives or other lawful and less intrusive behavior interventions, or such interventions are deemed to be inappropriate under the circumstances.

Physical restraint shall be limited to the use of such reasonable force as is necessary to protect a student or another member of the school community from assault or imminent, serious, physical harm. The staff member administering physical restraint shall use the safest method available and appropriate to the situation, subject to the safety requirements set forth in 603 CMR 46.05.

### **Prohibitions**

Physical restraint shall not be used:

- a. as a means of discipline or punishment;
- b. when the student cannot be safely restrained because it is medically contraindicated for reasons including, but not limited to, asthma, seizures, cardiac conditions, obesity, bronchitis, communication-related disabilities, or risk of vomiting;
- c. as a response to property destruction, disruption of school order, a student's refusal to comply with a policy or directive, or verbal threats when those actions do not constitute a threat of assault, or imminent, serious, physical harm; or
- d. as a standard response for any individual student. No written individual behavior plan or Individualized Education Program (IEP) may include use of physical

restraint as a standard response to any behavior. *Physical restraint is only an emergency procedure of last resort.*

Mechanical restraint, medication restraint, prone restraint, seclusion (unless permitted under the conditions described below) and the use of physical restraint in a manner inconsistent with 603 CMR 46.00 are strictly prohibited in the Sudbury Public Schools.

**Prone restraints** as defined by state regulations are not used in Sudbury programs.

**Seclusion** is prohibited in a public education program except in an emergency situation as a last resort on an individual student basis, called an emergency seclusion, where a student's behavior poses an imminent threat of assault, or imminent serious physical harm to self or others, but only if all of the following conditions, which require specific, advance documentation, are met:

- a. The student has a documented history of repeatedly causing serious self-injuries and/or injuries to other students or staff;
- b. The student is not responsive to directives or other less intrusive behavior interventions, or such interventions are deemed to be inappropriate under the circumstances;
- c. Other forms of intervention have failed to ensure the safety of the student and/or others;
- d. There are no medical contraindications, as documented by a licensed physician;
- e. There is psychological or behavioral justification for the use of seclusion and no psychological or behavioral contraindications, as documented by a licensed mental health professional;
- f. The program has obtained consent from the student's parent and, if appropriate, the student, to use seclusion in an emergency situation and such use has been approved in writing by the Principal;
- g. Any individual using seclusion has received training about alternative behavior interventions and management techniques; and
- h. The program has documented compliance with (a) and (d) through (g) above in advance of the use of seclusion and maintains the documentation.

No written individual behavior plan or Individualized Education Program (IEP) may include use of seclusion as a standard response to any behavior. At all times during the emergency use of seclusion, a staff member must continuously and actively monitor and observe the student who must be observable in all parts of the room or area being used, be immediately available to the student, and continue to use de-escalation and calming strategies with the student, unless it is unsafe or counterproductive for the purpose of calming the student. The emergency use of seclusion must cease as soon as the student's behavior no



longer poses a threat of assault or immediate serious physical harm to the student or others, or if the student is observed to be in severe distress such as having difficulty breathing. The Principal's approval must be obtained if the emergency seclusion is used for a period longer than 30 minutes.

Any program of the Sudbury Public Schools that uses the emergency intervention of seclusion, consistent with the requirements above, must examine and adopt alternatives and strategies for reducing and eliminating its use no later than 3 years from the effective date of the Regulations (Regulations effective date is August 17, 2026).

### **Proper Administration of Physical Restraint**

Only Sudbury Public Schools personnel who have received training pursuant to 603 CMR 46.04(2) or 603 CMR 46.04(3) (i.e., required annual training for all staff or In-depth staff training, respectively) shall administer physical restraint on students. Whenever possible, the administration of a restraint shall be witnessed by at least one adult who does not participate in the restraint. As stated explicitly in the Regulations, however, the training requirements contained in 603 CMR 46.00 - and described in this policy - shall not preclude a teacher, employee or agent of a public education program from using reasonable force to protect students, other persons or themselves from assault or imminent, serious, physical harm.

When administering a physical restraint, trained staff shall comply with the requirements regarding use of force, method, duration of the restraint, and safety, as set forth in the Regulations. A person administering a physical restraint shall use only the amount of force necessary to protect the student or others from physical injury or harm, as well as the safest method available and appropriate to the situation, subject to the safety requirements in the Regulations. In terms of duration of restraint, all physical restraint must be terminated as soon as the student is no longer an immediate danger to himself or others, or the student indicates that he or she cannot breathe, or if the student is observed to be in severe distress, such as having difficulty breathing, or sustained or prolonged crying or coughing.

Additional safety requirements for the use of physical restraint include:

- a. No restraint shall be administered in such a way that the student is prevented from breathing or speaking. During the administration of a restraint, a staff member shall continuously monitor the physical status of the student, including skin temperature and color, and respiration.
- b. Restraint shall be administered in such a way so as to prevent or minimize physical harm. If, at any time during a physical restraint, the student expresses or

demonstrates significant physical distress, including, but not limited to, difficulty breathing, the student shall be released from the restraint immediately, and school staff shall take steps to seek medical assistance.

- c. If a student is restrained for a period longer than 20 minutes, program staff shall obtain the approval of the Principal. The approval shall be based upon the student's continued agitation during the restraint, justifying the need for continued restraint.
- d. Program staff shall review and consider any known medical or psychological limitations, known or suspected trauma history, and/or behavioral intervention plans regarding the use of physical restraint on an individual student.
- e. After the release of a student from a restraint, program staff shall implement follow-up procedures. These procedures shall include reviewing the incident with the student to address the behavior that precipitated the restraint, reviewing the incident with the staff person(s) who administered the restraint to discuss whether proper restraint procedures were followed; and consideration of whether any follow-up is appropriate for students who witnessed the incident.

### **Staff Training**

All school staff must receive annual training regarding the Sudbury Public Schools' Restraint Policy. Staff training must occur within the first month of each school year and, for employees hired after the school year begins, within a month of their employment. The schools should maintain documentation of the training.

Training shall include:

- Information on the role of the student, family, and staff in preventing restraint;
- Sudbury's Restraint Prevention and Behavior Support procedures, including the use of time-out as a behavior support strategy distinct from seclusion;
- Interventions that may preclude the need for restraint, including de-escalation techniques and other alternatives to restraint in emergency circumstances;
- Types of permitted physical restraints and related safety considerations, including information about the increased risk of injury to a student when any restraint is used, in particular a restraint of extended duration;
- Administering physical restraint in accordance with medical or psychological limitations, known or suspected trauma history, and/or behavioral intervention plans applicable to an individual student; and
- Identification of program staff who have received in-depth training in the use of physical restraint and who may serve as school-wide resources to assist in ensuring proper administration of physical restraint and implementation of the Regulations.

### **Reporting Requirements**

Staff must report the use of any physical restraint as specified in the Regulations as well as the use of an emergency seclusion.

**Reporting to Principal:** The staff member who administered the restraint/emergency seclusion shall verbally inform the principal of the restraint/emergency seclusion as soon as possible and by written report no later than the next school working day. If the principal administered the restraint/emergency seclusion, the principal shall prepare the written report and submit it to the individual or team that the superintendent designates for review.

- **Maintain Ongoing Record:** The principal shall maintain an ongoing record of all reported instances of physical restraint and emergency seclusion, if any (the “Physical Restraint Log” and “Seclusion Log”), which must be made available for review by the parent consistent with the student record regulations or the Massachusetts Department of Elementary and Secondary Education (MA DESE) upon request.
- **Weekly Review:** The principal shall conduct **a weekly review** of the Physical Restraint Log and Seclusion Log to identify students who have been restrained/emergency secluded multiple times during the week.
  - If such students are identified, the principal shall convene one or more review teams, as the principal deems appropriate, to assess each student’s progress and needs. If the principal directly participated in a restraint/emergency seclusion, a duly qualified person designated by the superintendent shall lead the review team’s discussion.
  - The review team’s assessment shall include at least the following:
    - review and discussion of the written reports submitted in accordance with the Regulations and any comments the student and parent provided about the reports and the use of the restraints/emergency seclusion;
    - an analysis of the circumstances leading up to each restraint/emergency seclusion, including factors such as time of day, day of the week, antecedent events, and individuals involved;
    - consideration of factors that may have contributed to escalation of behaviors, consideration of alternatives to restraint/emergency seclusion, including de-escalation techniques and possible interventions, and such other strategies and decisions as appropriate, with the goal of reducing or eliminating the use of restraint in the future; and agreement on a written plan of action by the program.
  - The principal shall ensure that a record of each individual student review team is maintained and made available for review by MA DESE or the parent, upon request.
- **Monthly Review:** The principal shall conduct **a monthly review** of the Physical Restraint Log and Seclusion Log. This review shall consider

patterns of use of restraints/emergency seclusion by similarities in the time of day, day of week, or individuals involved; the number and duration of restraints/emergency seclusions school-wide and for individual students; the number and type of injuries, if any, resulting from use of restraint. The principal shall determine whether it is necessary or appropriate to modify the school district's policy, conduct additional training on restraint reduction/prevention strategies (e.g., positive behavioral interventions and supports) or take such other appropriate action necessary or appropriate to reduce or eliminate restraints.

**Reporting to Parents:** The principal shall make reasonable efforts to inform the student's parent of the restraint/emergency seclusion within 24 hours of the event and shall notify the student's parent by written report sent within three school working days of the restraint/emergency seclusion either to an email address provided by the parent for communication about the student or by regular mail postmarked no later than three school working days of the restraint/emergency seclusion. The written report must contain the information set forth in 603 CMR 46.06(4). The principal must ensure that the written restraint/emergency seclusion report provided to the student's parent is provided to the parent in the language in which report cards and other necessary school-related information are customarily provided to the parent. The principal shall provide the student and the parent an opportunity to comment orally and in writing on the use of the restraint/emergency seclusion and on information in the written report.

**Reporting to MA DESE:** When a physical restraint or emergency seclusion has resulted in an injury to either a student or staff member, the Sudbury Public Schools shall send a copy of the written report of that restraint/emergency seclusion to MA DESE no later than three (3) school working days of the administration of the restraint/emergency seclusion, along with a copy of Physical Restraint Log and Seclusion Log, if any, for the 30-day period before the reported restraint/emergency seclusion.

Additionally, the Sudbury Public Schools must collect and annually report data to the MA DESE regarding the use of physical restraints and emergency seclusion. Sudbury shall report the data in the manner and form the MA DESE directs.

## **TIME-OUT USE PROCEDURES**

**Time-out** is a behavioral support strategy in which a student temporarily separates from the learning activity or the classroom, either by choice or by direction from staff, for the purpose of calming. During time-out, a student must be continuously observed by a staff member in an unlocked setting from which the student is permitted to leave. Staff shall



be with the student or immediately available to the student at all times. Time-out shall cease as soon as the student has calmed.

If a program uses time-out as a behavioral support strategy, the program must have a procedure for the use of time-out that includes a process for obtaining principal approval of time-out for more than 30 minutes based on the individual student's continuing agitation. Time-out strategies and usage shall be used in accordance with DESE guidance and regulations. Each school that utilizes time-out as a behavioral strategy will have written procedures consistent with state laws and regulations.

### **Safeguards for Areas Used for Time-Out or Emergency Seclusion**

Any room or area used for time-out must be clean, safe, and sanitary; appropriate for the purpose of calming students, including, but not limited to, being of appropriate size for the age and the needs of the student; appropriately lighted, ventilated, and heated or cooled (consistent with the remainder of the building); free of objects or fixtures that are inherently dangerous to the student; and in compliance with any applicable local fire and building code requirements and any other standards listed by the MA DESE in guidance.

Any room or space used for emergency seclusion as permitted under the conditions enumerated in 603 CMR 46.07(2) must meet the same physical space safeguards set forth in the paragraph above that are required for a time-out space. Sudbury Public Schools must ensure that school administration has inspected any room or space for compliance with these physical space safeguards at a minimum of one time per week during which the room or area is used for emergency seclusion.

### **Preventing Student Violence, Self-Injurious Behavior, and Suicide**

As set forth in the Regulations, the Sudbury Public Schools shall develop methods for preventing student violence, self-injurious behavior, and suicide, including individual crisis planning and de-escalation of potentially dangerous behavior occurring among groups of students or with an individual student.

### **Parent Engagement**

In accordance with the Regulations, the Sudbury Public Schools shall engage parents in discussions about restraint prevention and the use of restraint solely as an emergency procedure of last resort. Sudbury Public Schools will post this policy regarding the Prevention of Physical Restraint of Students on the school district's website and will include the policy in school handbooks. Sudbury Public Schools welcomes parents to request a meeting with their child's principal or IEP Team Chair to discuss any individual

use of physical restraint or emergency seclusion or physical restraint, time-out procedures, and emergency seclusion in general.

### **Complaint Procedure**

The Sudbury Public Schools will consider and investigate any complaints that the school district receives regarding the school district's physical restraint practices, including, but not limited to, complaints related to time-out and emergency seclusion practices.

Sudbury has developed a complaint form to assist individuals with sharing their concerns ([Complaint Form](#)). Sudbury accepts online submissions of this complaint form as well as complaints submitted via fax, email, US mail, and in-person. Anyone who prefers or needs a paper copy of the complaint form, has difficulty accessing the online form, has additional questions or requires assistance with submitting a complaint may contact the Sudbury Public Schools' Student Services office at:

*Sudbury Public Schools*  
*Director of Student Services*  
40 Fairbank Road  
Sudbury, MA 01776  
(978) 639-3202 Fax: (978) 443-9001  
[Student\\_Services@sudbury.k12.ma.us](mailto:Student_Services@sudbury.k12.ma.us)

Complaints must be filed within sixty (60) school days of the event giving rise to the complaint.

The District will investigate the complaint, including interviewing any witnesses deemed necessary and appropriate and reviewing relevant written documentation and data related to the concern. The District's investigation generally will be completed within twenty (20) school days of receiving the complaint. If this general timeline is not met, the District will document the reason(s) for not meeting the timeline. If the complainant is dissatisfied with the determination following the investigation, the complainant may appeal to the Superintendent of Schools who may be reached at 40 Fairbank Road, Sudbury, MA 01776.

MAURA T. HEALEY

GOVERNOR



STEPHEN ZRIKE JR., Ed. D

SECRETARY

KIMBERLEY DRISCOLL

LT. GOVERNOR

EXECUTIVE OFFICE OF  
EDUCATION

## Guidance for K-12 Schools Related to Interacting with Civil Law Enforcement

**August 21, 2026**

The Governor's Office, the Executive Office of Education (EOE), and the Department of Elementary and Secondary Education (DESE) issue this guidance pursuant to *An Act promoting rule of law, oversight, trust and equal constitutional treatment* ("PROTECT Act" or "Act"). [Stat. 2026, c. 163](#), §§ 1–24. Please review this guidance together with DESE's Model Policy, for adoption by school committees and boards of trustees, and DESE's Model Procedures, for implementation by superintendents and executive directors, also released today.

In preparing this guidance, as well as the Model Policy and Model Procedures, DESE consulted with the Attorney General's Office, the Massachusetts Association of School Committees, the Massachusetts Association of 766 Approved Private Schools and numerous other stakeholders, consistent with the Act. As to the recommendations and obligations for K-12 schools, this guidance supersedes the *Recommendations For Entities Providing Education and Child Care Services Related to Interacting with Federal Immigration Officers* issued in May 2026 pursuant to the Governor's Executive Order 650: Protecting Access to Essential Services and Keeping Massachusetts Communities Safe.

### I. Introduction

On August 5, 2026, Governor Maura Healey signed the PROTECT Act. It is now the law in Massachusetts that, except as required by state or federal law or as required for the Commonwealth or its subdivisions to administer a state or federally supported or funded program, civil arrests, including for federal immigration enforcement, **are not allowed** in the following nonpublic areas: school grounds during operating hours (defined below), without a Judicial Warrant or Judicial Order.<sup>1</sup>

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<sup>1</sup> This guidance addresses the protections against civil arrests adopted in the PROTECT Act. Other constitutional protections limit civil law enforcement access to nonpublic places, regardless of whether the purpose is an arrest, without a Judicial Warrant or Judicial Order.

The Act requires that school committees, collaborative schools, and charter school boards of trustees ensure that every school under their jurisdiction has a written policy (described in the Act as an “emergency response plan”) that addresses student and staff safety relating to interactions with law enforcement agents engaged in civil law enforcement.<sup>2</sup> Under the Act, that plan must reflect the seven required elements of the DESE Model Policy: (1) identification and designation of a person(s) at each school and the district/administrative office as the individual(s) responsible for having primary contact with law enforcement agents; (2) procedures for contacting the designated authorized person(s), who will contact the school’s attorney; (3) procedures for documenting interactions with law enforcement agents on school grounds; (4) procedures for notifying a parent or guardian (or the student if 18 years or older or emancipated) if a law enforcement agent requests access to a student or to a student’s information for any civil law enforcement purpose; (5) procedures following the confirmation of law enforcement agents engaged in civil law enforcement on school grounds, including procedures to notify parents and guardians, teachers, administrators, and school personnel in a manner that ensures the confidentiality and privacy of any potentially identifying information; (6) a plan to confirm and update students’ emergency contacts and allow for more than one person to be listed; and (7) a plan to share these procedures and policies with students and families, including on the school website. Policies and procedures should apply equally to all forms of law enforcement and should be focused on maintaining student safety.

## II. Definitions

This guidance uses the following words and phrases consistent with the PROTECT Act:

**“Civil arrest”** means an arrest that is not for the purpose of preparing the person subject to such arrest for criminal prosecution for an alleged violation of a state or federal criminal law. Civil arrests may be authorized by, among other things: (1) a parole warrant issued under G.L. c. 127, § 149A, or a probation warrant issued under G.L. c. 279, § 3; (2) state law permitting protective custody for incapacitated and intoxicated persons, G.L. c. 111B § 8, or (3) an administrative warrant issued by a federal agency like the United States Immigration and Customs Enforcement (ICE) agency for violations of the federal Immigration and Nationality Act, or related civil immigration enforcement efforts.

**“Civil law enforcement”** means efforts to investigate, enforce or assist in the investigation or enforcement of state or federal civil law, including, but not limited to, any federal civil immigration law. For added context, civil law enforcement often relates to preventative detention for an individual’s safety or security, enforcement of civil actions in court,

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<sup>2</sup> While the PROTECT Act does not require private K-12 schools to adopt such policies, we encourage them to do so, consistent with this guidance and the *Recommendations For Entities Providing Education and Child Care Services Related to Interacting with Federal Immigration Officers*, which remain in effect for K-12 private schools and private (independent) colleges and universities.



or immigration law enforcement. In contrast, criminal law enforcement involves the investigation and enforcement of state or federal criminal laws (like those outlawing theft and assault). Note that law enforcement officers (defined below) can engage in civil law enforcement and/or criminal law enforcement.

**“Judicial Warrant”** or **“Judicial Order”** refers to an arrest warrant or other judicial order, signed by a judge or magistrate sitting in the judicial branch of a local or state government or of the federal government, authorizing an arrest. *See* Appendix A for examples.

**“Law enforcement officer”** or **“officer”** means any agent or officer of a federal, state, county, municipal, or district law enforcement agency, including but not limited to local police departments, sheriffs, constables, the Massachusetts State Police, the United States Immigration and Customs Enforcement (ICE) agency, the United States Customs and Border Protection (CBP) agency, and the United States Department of Homeland Security (DHS).

**“Operating hours”** means regular school hours, student drop off and pick up windows, before-school and after-school programming, and school-sponsored events.

**“School”** means a school administered by the school department of a city, town or regional school district; a county agricultural school; an independent vocational school or a vocational school operated by a county; a Commonwealth charter school or a Horace Mann charter school established under G.L. c. 71, § 89 (“charter school”); a special day school or other day facility or a short or long term residential school providing educational programs for children with disabilities established pursuant to chapter 71B and in accordance with chapter 766 of the acts of 1972; or a school operated by an education collaborative established under G.L. c. 40, § 4E (“collaborative school”).

**“School district”** means the school department of a city or town, a regional school district, an independent vocational school or a vocational school or agricultural school operated by a county.

**“School grounds”** means the main school building(s) and any other building or property owned or controlled by a school or school district and used by the school in direct support of or in a manner related to the school’s educational or athletic purpose. This includes playgrounds, fields, parking lots, recreation areas, athletic fields, courts, competition areas and other locations owned or controlled and used for school-related purposes, whether or not physically connected to the main school building(s). During operating hours, as defined above, school grounds are nonpublic.<sup>3</sup>

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<sup>3</sup> Although bus stops are generally not considered “school grounds,” please see Section III(C) (Escalation Protocol) for recommendations on how to handle law enforcement activity at bus stops.

### **III. Guidance Regarding Interactions with Law Enforcement Officers Engaged in Civil Law Enforcement**

This guidance includes the topics required by the PROTECT Act, marked with an asterisk (\*), and other information that the Governor’s Office, Attorney General’s Office, EOE, and DESE deem relevant to schools.

#### **A. General Guidance for Interacting with Law Enforcement Officers**

A written procedure should provide general advice for employees/staff and administrators about how to interact with law enforcement officers engaged in civil law enforcement, including:

1. Employees, staff, and administrators are encouraged to remain calm when engaging with law enforcement officers.
2. Employees, staff, and administrators should never attempt to physically interfere with law enforcement activities, nor should they feel compelled to approach a law enforcement officer or engage with them first.
3. If employees and staff feel unsafe engaging with law enforcement officers, they can decline to interact with the officers and instead rely on administrators, as described below.

Civil arrests are not allowed on school grounds during operating hours, unless law enforcement officers have a Judicial Warrant or Judicial Order.<sup>4</sup> If law enforcement officers proceed to conduct a civil arrest in these areas in violation of the PROTECT Act, no one should attempt to physically interfere with them; rather, on-site staff should follow the guidance for bystanders to document an interaction, included in Section III(G) (Documentation of Interactions) and Section IV(B) (Rights of Bystanders) below. After law enforcement has left the school grounds, the school should report the incident to the Attorney General’s Office Civil Rights Division.

#### **B. Designated Contact Person(s)\***

Under the PROTECT Act, schools must designate a contact person in the principal’s office (“school-level contact person”) and an authorized contact at the Superintendent’s or Executive Director’s office (“district-level contact person”) to be notified if law enforcement officers arrive on site or request information.<sup>5</sup> Different people may serve as the designated

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<sup>4</sup> As noted in Section III(M) (Existing Obligations), nothing in this guidance prohibits appropriate cooperation with authorities, including police, fire departments, emergency medical services, child protective authorities, or other public safety officials, responding to an emergency, protecting a child from abuse or neglect, or otherwise exercising lawful authority unrelated to civil law enforcement.

<sup>5</sup> If the school does not have a district office or administrative office that is distinct from the school itself, it may be appropriate to have the same contact person serve as the school-level contact person and district-level contact person.

contact person at different times throughout the day, and you should strongly consider naming at least one “back up” contact person at the school- and district-levels. We recommend that (1) the highest-ranking administrator or manager at the school serve as the primary designated school-level contact person, and (2) the Superintendent, Executive Director, or their designee, or an attorney serve as the district-level contact person.

The written procedures required by the PROTECT Act must include the name(s) and contact information for the designated contact person(s). If multiple people will share this role, you may consider giving them a shared cell phone or telephone number, to make it easier for front-line staff to reach them in case of an emergency.

C. Escalation Protocol\*

The written procedures required by the PROTECT Act must address how employees, staff, and administrators should respond if law enforcement officers arrive on site and whom to notify (the “escalation protocol”). Schools must make sure that staff and employees are aware of the protocol, and how to contact the relevant individuals. This protocol should be simple, easy to remember, and consistent with procedures used in other circumstances. An escalation protocol should include the following instructions:

1. If law enforcement officers engaged in civil law enforcement arrive on site and there are no apparent exigent (emergency) circumstances, employees and staff should inform the officers that the employees/staff will contact an administrator to assist them and that they should wait where they are (ideally outside, away from students/children and their families).
2. The employee or staff member should immediately contact the school-level contact person.
3. Once notified, the school-level contact person should immediately call the district-level contact person and go to the location where the law enforcement officers are waiting. If the school has access to an attorney, the written procedures should provide for either the school-level contact person or the district-level contact person to call the attorney and keep them on the phone for advice.
4. The school-level contact person should speak to the law enforcement officers. The school-level contact person should ask the law enforcement officers for identification and record their names, agencies, and badge numbers.
5. The school-level contact person should ask to view any warrant or other documentation. The school-level contact person—with assistance from an attorney, if able, and/or the district-level contact person—should review the documents to determine whether the law enforcement officers have a valid Judicial Warrant or Judicial Order. *See* Section III(F) (Review of Warrant) for tips on reviewing a warrant.

- a. If the law enforcement officers have a valid Judicial Warrant or Judicial Order authorizing an arrest or entry to search or both, the school-level contact person should inform the law enforcement officers that they may enter the school grounds; however, the school-level contact person should request that, where feasible, law enforcement officers avoid any areas where students/children are present.
- b. If the law enforcement officers do not have a valid Judicial Warrant or Judicial Order, or they have only an administrative warrant (*see* Appendix A for an example), the school-level contact person must inform them that they are not authorized to conduct the arrest on school grounds and ask them to leave.<sup>6</sup>
- c. If the law enforcement officers proceed to conduct a civil arrest on school grounds in violation of the PROTECT Act, no one should attempt to physically interfere with them; rather, staff should follow the guidance for bystanders to document an interaction, included in Section III(G) (Documentation of Interactions) and Section IV(B) (Rights of Bystanders) below. If there is an imminent threat to the safety of a child, staff member, family member, or other person, program staff should not hesitate to call 9-1-1 for assistance.
- d. After law enforcement has left the school grounds, the school should report the incident to the Attorney General's Office Civil Rights Division.

In addition to the procedures described above, schools are encouraged to consider the various scenarios in which interactions with law enforcement officers engaged in civil law enforcement may occur in their programs and on their grounds, so that they may prepare escalation protocols for these particular scenarios. Schools should also consider including guidance tailored to certain staff positions, such as front-office staff, that may be more likely to interact with law enforcement officers engaged in civil law enforcement. Schools should also consider updating existing Emergency Operations Plans and Medical and Behavioral Health Emergency Response Plans to ensure student safety in the event of any type of law enforcement activity on or near school grounds.

Additionally, schools should review school transportation contracts and communicate with school transportation companies regarding policies and protocols for bus drivers in the event of active law enforcement activity near a school bus stop. This includes considerations for special education transportation. Transportation-related procedures should focus on maintaining

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<sup>6</sup> In rare circumstances, law enforcement officers may identify a clear and immediate health or safety threat that qualifies as an exception to the warrant requirement.



student safety and avoiding dangers associated with dropping a student near an active crime scene or any law enforcement arrest or operation.

Schools should review and consider updating policies and protocols for ensuring student safety when law enforcement activities are being carried out on school grounds. Policies should apply equally to all forms of law enforcement and should be focused on maintaining student safety.

D. Checklists and Approved Language

We encourage schools to develop checklists and draft approved language for employees, staff, administrators, and the designated contact person(s) to use when interacting with law enforcement officers engaged in civil law enforcement. These checklists can include the escalation protocol with clear instructions about whom employees/staff should contact if law enforcement officers are on site or making requests.

Examples of “Approved Language” may include:

1. “I am not authorized to allow you to enter the school. Please wait here while I contact an administrator.”
2. “I am not authorized to discuss specific individuals or to speak with you about this student/child/employee. I am going to contact an administrator who will discuss this further with you.”
3. “I am not permitted to discuss/disclose private information to you.”

E. Proactive Discussions with School Attorney(s)

Where applicable, the school and/or school district should confer with its attorney(s) about the best and most expedient way to reach them in an emergency, including the arrival of law enforcement officers to school grounds. The school/school district should make sure that the school-level and district-level contact persons have means to reach the attorney immediately if necessary. The school/school district may also want to consult its attorney as part of establishing the procedures outlined in this guidance.

F. Review of Warrant

Written procedures should include information about how to identify a valid Judicial Warrant or Judicial Order. *See* Appendix A (Sample Judicial Warrants and Administrative Warrants), below for sample warrants.

Judicial Warrants and Judicial Orders are documents issued by a judge or magistrate sitting in the judicial branch of state or federal government. These documents authorize a search of a specific place or an arrest of a specific person based on sufficient information to support that a crime has been committed (“probable cause”). Note that other judicial orders can include subpoenas or summons, but they do not allow physical access into nonpublic places.

A Judicial Warrant is: (1) signed by a judge, magistrate, or assistant clerk magistrate and dated; (2) issued by a court; and (3) includes the location to be searched or the persons or items to be seized/arrested.

A Judicial Order may take many forms but should include: (1) the caption of a court case; (2) the name of the court; and (3) a judge, clerk magistrate, or assistant clerk magistrate's signature, with a date.

As stated above in Section III(C) (Escalation Protocol), if law enforcement officers engaged in civil law enforcement arrive on-site, employees/staff should contact the school-level contact person who will contact the district-level contact person and proceed to the location where the law enforcement officers are waiting. (School procedures should direct either the school-level contact person or the district-level contact person to call the school attorney at this time, as well.) Once the school-level contact person meets the officer and asks to view any warrants or orders, they should describe those documents over the phone to the school's attorney, who will evaluate the documents and advise the school-level contact person on their validity. If the school-level contact person feels safe doing so, they may ask the law enforcement officer if they may send a photo of the warrant or order to the school's attorney or show the warrant or order to the attorney via a video call. If the school does not have access to an attorney, or cannot reach the attorney, the school-level contact person, in consultation with the district-level contact person, if there is one, should use this guidance and Appendix A to determine whether the law enforcement officers have a valid Judicial Warrant or Judicial Order. *See Appendix A (Sample Judicial Warrants and Administrative Warrants).*

G. *Documentation of Interactions\**

Under the PROTECT Act, schools must include in their written procedures instructions for documenting interactions with law enforcement officers engaged in civil law enforcement. Employees, staff, administrators, and the designated contact person(s) are encouraged to wait until they feel safe to write down what happened. This may be after the officers leave the school grounds. Schools should use an existing form or create a new one to record interactions with law enforcement officers and keep those records as they would any other school records, in the normal course.

Under the escalation protocol recommended above, employees, staff, administrators, and the designated contact person(s) may interact with law enforcement officers in different ways and at different times. Everyone should be advised to write down what they remember of the incident, including but not limited to the following information:

- Date and time when law enforcement officers arrived on school grounds or made the information request;
- The names and badge numbers of the officers, and the agency they represented;
- The number of vehicles and license plate numbers, if visible;

- The names of witnesses, students, or other staff involved;
- Steps taken to notify the school-level contact person, the district-level contact person, or the school's attorney, as the case may be;
- The actions of the law enforcement officers, including whether the officers complied with school instructions;
- Whether the law enforcement officers had a valid Judicial Warrant or Judicial Order, or some other documentation;
- Whether a civil arrest was made on school grounds; and
- Impact on any students/children/employees/staff (after any immediate issues have been addressed) and any follow up actions needed to support them.

See DESE Model Procedures for a template form for recording interactions with law enforcement officers engaged in civil law enforcement.

Bystanders, including employees and staff, can openly (not secretly) videorecord the interaction, but they must not interfere.

#### H. School Resource Officers

School districts with School Resource Officers (SROs) should ensure that they have an SRO Memorandum of Understanding (MOU) that complies with the mandatory [statewide model](#), and districts are encouraged to distribute this MOU to school administrators and school safety personnel. Under state law, the SRO shall not (i) serve as school disciplinarian, enforcer of school regulations, or in place of licensed school psychologists, psychiatrists, or counselors; or (ii) use police powers to address traditional school discipline issues, including non-violent disruptive behavior. According to the model MOU, "it may be appropriate for school administrators rather than the SRO [to] deal with low-level offenses including but not limited to misdemeanor allegations of threats, assault and battery, larceny, receiving stolen property, and willful, malicious, or wanton destruction or injury to personal property." For circumstances that require juvenile court intervention, a summons is the preferred method for bringing juveniles to court, rather than making an arrest on school grounds, unless there is reason to believe the juvenile will not appear upon a summons.

Per the model SRO MOU, school district personnel and SROs shall not disclose to a law enforcement officer or agency, including local, municipal, regional, county, state and federal law enforcement, any information relating to a student or a student's family member from its databases and other recordkeeping systems including: (i) immigration status; (ii) citizenship; (iii) neighborhood of residence; (iv) religion; (v) national origin; (vi) ethnicity; or (vii) suspected, alleged, or confirmed gang affiliation, unless it is germane to a specific unlawful incident or to a specific prospect of unlawful activity the school is otherwise required to report. Schools are encouraged to share any new or updated policies or procedures they adopt in accordance with the PROTECT Act, and policies pertaining to student privacy, with their on-site SROs.

I. Parental Notice

1. Notice to School Community of the Presence of Law Enforcement Officers\*

When a school confirms the presence of law enforcement agents engaged in civil law enforcement on school grounds, the school should notify students' parents and guardians, teachers, administrators, and school personnel. The school should provide this notice in a manner that ensures the confidentiality and privacy of any potentially identifying information. *See* DESE Model Procedures for a template notice.

2. Individualized Notice to Parents When Law Enforcement Officers Are Seeking a Particular Student or Information about that Student

If the law enforcement officers are trying to reach a minor child/student or seeking information about a minor child/student, employees/staff should contact the school-level contact person(s) and then immediately inform the minor child/student's parent or legal guardian. If the student is 18 years or older, or emancipated, employees/staff should notify the student directly, in addition to notifying the school-level contact person. Schools are encouraged to designate an employee or staff member who will notify families or students as part of their escalation protocol. *See* DESE Model Procedures for a template notice.

J. Protection of Personally Identifiable Information

Schools cannot disclose personally identifiable information about a student or child in their care to third parties, including law enforcement officers and the media, either orally or in writing unless: the school has specific informed consent from the student/child's parent or guardian (or students themselves if at least 18 years old or emancipated); it is pursuant to a Judicial Warrant, Judicial Order, or subpoena; or there is a health or safety emergency, as the case may be. Generally, schools should also respect the privacy preferences and concerns of a student's parent or guardian (or the student himself if over 18 years old or emancipated) in response to media inquiries and, to the extent consistent with the law, interactions of law enforcement officers that may implicate students.

Schools should allow parents/guardians (or students themselves if at least 18 years old or emancipated) to opt out of being included in directory information. They may also limit what information is included in the directory (e.g., by excluding the child's/student's address and place of birth), and limit disclosure to the school community. Under federal law, schools are required to notify students and their families at least once per year of what information is included in the directory, and to permit parents/guardians to opt out of including information in the directory at any time. Schools must communicate this information using translation or interpretation services to parents/guardians with limited English proficiency.

In the event law enforcement officers seek confidential information about school personnel, the school should refer the officers to their human resources department, which should follow standard protocols.



K. Caregiver Plans and Contact Information

Schools are encouraged to establish clear protocols for their response in the event a child/student or their parent/guardian is detained by law enforcement officers. Under the PROTECT Act, schools are expected to develop a plan to make sure that emergency contact information, alternative caregiver contacts, and authorized pick-up contacts are up to date for all students/children. As part of this review, schools must allow parents/guardians to list more than one person as an emergency contact. Schools are also encouraged to keep any associated documentation on file, such as an authorization of another caregiver, temporary agent, or guardian.

L. Visitor Policies

Schools should adopt written visitor policies (or procedures) that specify restrictions for visitors and that apply equally to all visitors—that is, the visitor policy (or procedure) does not differentiate between law enforcement officers visiting to conduct civil law enforcement and other types of visitors.

M. Existing Obligations

Nothing in this guidance alters the school’s obligations to comply with state and federal laws or existing policies or procedures.

Nothing in this guidance prohibits appropriate cooperation with authorities, including police, fire departments, emergency medical services, child protective authorities, or other public safety officials responding to an emergency, protecting a child from abuse or neglect, or otherwise exercising lawful authority unrelated to civil immigration enforcement. If there is an imminent threat to the safety of a child, staff member, family member, or other person, the school should not hesitate to call 9-1-1 for assistance.

#### IV. **Rights of a Person Being Arrested/Detained and Rights of a Bystander**

A. Rights of the Person Being Arrested or Detained

**Right to Remain Silent:** A person being arrested or detained by civil law enforcement officers, including federal immigration officers, does not have to answer questions about their immigration status, citizenship, where they were born, or how they entered the United States. The person can say, “I am exercising my right to remain silent,” and refuse to speak with the law enforcement officer until they have spoken with an attorney. Beginning on September 4, 2026, the PROTECT Act prohibits law enforcement officers from asking about immigration status or citizenship, except as required by state or federal law, or materially related to a specific criminal offense.

**Right to Hire/Consult Attorney:** A person being arrested or detained has the right to hire and speak with an attorney, but the government is not generally required to provide one in immigration proceedings.

**Right to Refuse to Sign Documents:** A person being arrested or detained has the right to refuse to sign documents (e.g., waiver of rights, voluntary departure forms). The person has a right to read and understand any document before signing it.

B. *Rights of Bystanders*

**Right to Observe:** Bystanders to civil law enforcement actions, including federal immigration enforcement, have the right to observe officers and to video the encounter from a reasonable distance, as long as they do not interfere with the officers. Massachusetts law permits openly (not secretly) videorecording.

**Right to Remain Silent:** Though law enforcement officers may ask questions, bystanders have the right to remain silent. Bystanders are not required to answer questions about their own immigration status or the status of anyone else. As noted above, beginning on September 4, 2026, the PROTECT Act prohibits law enforcement officers from asking about immigration status or citizenship, except as required by other laws or specifically related to a potential criminal violation.

## V. **Support for Students and Children**

We encourage schools to offer counseling and social work support to students and children experiencing increased anxiety, especially those who are personally affected, and those whose families are directly affected by civil law enforcement activity, including federal immigration enforcement.

Moreover, it is important for schools to maintain awareness and sensitivity regarding student absences and behavioral challenges in school. Staff and educators should proactively engage and build trusting relationships with parents and students, offer support, and partner with families to address any attendance or behavioral concerns that may emerge.

Pursuant to the PROTECT Act, schools must develop a plan to share the required policies and procedures with students and families affiliated with your school. We recommend posting that material on the school's and/or school district's website(s).

It is essential that all communications with parents and guardians relating to student needs, transportation, updating alternative contacts and directory information, emergency protocols, law enforcement activity, or other matters be communicated in the parent/guardian's primary language, utilizing interpreters. Parental notices and written communications should use plain language to the extent practicable and be translated into the languages primarily used by your school's community.

## **VI. Human Resources/Labor/Union Issues**

Employees/staff are encouraged to raise any employment or labor concerns about interacting with law enforcement officers engaged in civil law enforcement, including federal immigration enforcement, with their human resources team or union representatives, respectively. These issues may include questions about this guidance and related policies or procedures, or general questions about personal situations involving civil law enforcement. Employees/staff are encouraged to review the resources listed in Section VIII (Additional Resources for Schools) for more information, as well.

## **VII. Trainings Regarding Interactions with Civil Law Enforcement**

Schools are encouraged to conduct trainings on the requirements of the PROTECT Act, the recommendations included in this guidance, and any related policies or procedures adopted by the school or district to support safety on school grounds for all students and staff, regardless of national origin or immigration status. Reminders to employees and staff on escalation protocol are often best practice here. DESE, in consultation with EOE, the Massachusetts Office for Refugees and Immigrants, and the Massachusetts Attorney General's Office, will develop a model training incorporating the components of this guidance, along with its Model Policy and Model Procedures, that school committees, collaborative schools, and charter school boards of trustees may provide to their staff.

## **VIII. Additional Resources for Schools**

The Massachusetts Attorney General's Office, Massachusetts Office for Refugees and Immigrants, and DESE have created the following resources for the public to learn more about their rights. We encourage members of the school community to review these resources, and we suggest that schools consider posting or disseminating these resources to students/children, families, and employees/staff.

- [Massachusetts Attorney General: Resources for Immigrants in Massachusetts](#)
- [Massachusetts Office for Refugees and Immigrants: Community Resource Toolkit](#)
- [Massachusetts Attorney General Guidance: KNOW YOUR RIGHTS: ICE Enforcement An Updated Guide for Immigrants, Families, and Communities \(available in \*Spanish\*, \*Portuguese\*, \*Haitian Creole\*, \*Chinese\*, \*Vietnamese\*\)](#)
- [Massachusetts Attorney General Guidance: General Information for Massachusetts Service Providers Regarding Immigration Enforcement \(available in \*Spanish\*, \*Portuguese\*, \*Haitian Creole\*, \*Chinese\*, \*Vietnamese\*\)](#)
- [Massachusetts Attorney General Guidance: K-12 Schools' Obligations to Protect Students and Their Information](#)
- [Massachusetts Attorney General Flyer: Immigrant Students' Right to Attend School: A Guide for Families \(available in \*Spanish\*, \*Portuguese\*, \*Haitian Creole\*, \*Vietnamese\*, \*Chinese\*\)](#)

- [Massachusetts Attorney General Flyer: K-12 Schools on Protections for Students and their Information](#)
- [Emergency Planning Guide for Parents with Uncertain Immigration Status](#) *(available in [Spanish](#), [Portuguese](#), [Haitian Creole](#), [Simplified Chinese](#))*
- [Emergency Planning Fact Sheet for Parents with Uncertain Immigration Status](#) *(available in [Spanish](#), [Portuguese](#), [Haitian Creole](#), [Simplified Chinese](#))*
- [Attorney General’s Advisory Regarding Equal Access to Public Education for All Students Irrespective of Immigration Status](#) *(available in [Spanish](#), [Portuguese](#), [Arabic](#))*
- [Upholding the Rights of Immigrant Students to Enroll in School: Guidance for School Committees and Districts](#)
- [Upholding the Rights of Immigrant Students to Enroll in School: Guidance for Families and Students](#) *(available in [Chinese](#), [Haitian Creole](#), [Portuguese](#), [Spanish](#), [Vietnamese](#))*



## APPENDIX A

### Sample Judicial Warrants and Administrative Warrants

Figure 1: State Court Judicial Warrant

|                                                                                                                 |                              |                         |
|-----------------------------------------------------------------------------------------------------------------|------------------------------|-------------------------|
| APPLICATION FOR SEARCH WARRANT<br>G.L. c. 276, §§ 1-7                                                           | TRIAL COURT OF MASSACHUSETTS |                         |
| NAME OF APPLICANT<br><div style="background-color: black; width: 100px; height: 1.2em; margin-top: 5px;"></div> | SUPERIOR<br>ESSEX            | COURT DEPT.<br>DIVISION |
| POSITION OF APPLICANT<br>Trooper, Massachusetts State Police                                                    | SEARCH WARRANT DOCKET NUMBER |                         |

I, the undersigned APPLICANT, being duly sworn, depose and say that:

1. I have the following information based upon the attached affidavit(s), consisting of a total of 77 pages, which is (are) incorporated herein by reference.
2. Based upon this information, there is PROBABLE CAUSE to believe that the property described below:
 

|                                     |                                                                                 |
|-------------------------------------|---------------------------------------------------------------------------------|
| <input type="checkbox"/>            | <i>has been stolen, embezzled, or obtained by false pretenses.</i>              |
| <input checked="" type="checkbox"/> | <i>is intended for use or has been used as the means of committing a crime.</i> |
| <input type="checkbox"/>            | <i>has been concealed to prevent a crime from being discovered.</i>             |
| <input checked="" type="checkbox"/> | <i>is unlawfully possessed or concealed for an unlawful purpose.</i>            |
| <input checked="" type="checkbox"/> | <i>is evidence of a crime or is evidence of criminal activity.</i>              |
| <input type="checkbox"/>            | <i>other (specify):</i>                                                         |
3. I am seeking the issuance of a warrant to search for the following property (*describe the property to be searched for as particularly as possible*):  
See Addendum A, which is incorporated herein by reference.
4. Based upon this information, there is also probable cause to believe that the property may be found (*check as many as apply*):  

|                                     |                                                                                               |
|-------------------------------------|-----------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> | <u><i>at (identify the exact location or description of the place(s) to be searched):</i></u> |
|-------------------------------------|-----------------------------------------------------------------------------------------------|

## APPENDIX A

### Sample Judicial Warrants and Administrative Warrants

Figure 2: Federal Court Judicial “search warrant” (left) & Administrative “ICE Warrant” (right)

AO 102 (Rev. 11-01) Search and Seizure Warrant

UNITED STATES DISTRICT COURT  
for the  
Southern District of California

In the Matter of the Search of  
(Address of place to be searched)  
2943 Highland Avenue  
San Diego, California

Case No. **'14 MJ 0 396**

**SEARCH AND SEIZURE WARRANT**

To: Any authorized law enforcement officer

An application by a federal law enforcement officer or an attorney for the government requests the search of the following person or property located in the Southern District of California  
claiming the person or describe the property to be searched and give its location:  
See Attachment A-2

The person or property to be searched, described above, is believed to conceal (identify the person or describe the property to be searched):  
See Attachment B-2

I find that the affidavit(s), or any recorded testimony, establish probable cause to search and seize the person or property.

**YOU ARE COMMANDED** to execute this warrant on or before February 11, 2014  
(Date of service of this warrant)

☒ in the daytime 6:00 a.m. to 10 p.m. ☐ at any time in the day or night as I find reasonable cause has been established

Unless delayed notice is authorized below, you must give a copy of the warrant and a receipt for the property taken to the person from whom, or from whose premises, the property was taken, or leave the copy and receipt at the place where the property was taken.

The officer executing this warrant, or an officer present during the execution of the warrant, must prepare an inventory as required by law and promptly return this warrant and inventory to United States Magistrate Judge Hon. David H. Barlick  
(Name)

☐ I find that immediate notification may have an adverse result listed in 18 U.S.C. § 2705 (except for delay of trial), and authorize the officer executing this warrant to delay notice to the person who, or whose property, will be searched or seized (unless the appropriate law officer says otherwise).  
Chantel, the facts justifying the later specific date of \_\_\_\_\_

Date and time issued: 1/31/2014 5:44 PM [Signature]  
Judge's signature

City and state: San Diego, California Hon. David H. Barlick, U.S. Magistrate Judge  
Printed name and title

U.S. DEPARTMENT OF HOMELAND SECURITY Warrant for Arrest of Alien

File No. \_\_\_\_\_  
Date: \_\_\_\_\_

To: Any immigration officer authorized pursuant to sections 236 and 237 of the Immigration and Nationality Act and part 237 of title 8, Code of Federal Regulations, to serve warrants of arrest for immigration violations

I have determined that there is probable cause to believe that \_\_\_\_\_ is removable from the United States. This determination is based upon:

☐ the execution of a charging document to initiate removal proceedings against the subject;

☐ the pendency of ongoing removal proceedings against the subject;

☐ the failure to establish admissibility subsequent to deferred inspection;

☐ biometric confirmation of the subject's identity and a records check of federal databases that affirmatively indicate, by themselves or in addition to other reliable information, that the subject either lacks immigration status or notwithstanding such status is removable under U.S. immigration law; and/or

☐ statements made voluntarily by the subject to an immigration officer and/or other reliable evidence that affirmatively indicate the subject either lacks immigration status or notwithstanding such status is removable under U.S. immigration law.

**YOU ARE COMMANDED** to arrest and take into custody for removal proceedings under the Immigration and Nationality Act the above-named alien.

(Signature of Authorized Immigration Officer)  
(Printed Name and Title of Authorized Immigration Officer)

**Certificate of Service**

I hereby certify that the Warrant for Arrest of Alien was served by me at \_\_\_\_\_ (Location)  
on \_\_\_\_\_ (Name of Alien) on \_\_\_\_\_ (Date of Service), and the contents of this notice were read to him or her in the \_\_\_\_\_ (Language) language.

\_\_\_\_\_  
Name and Signature of Officer

\_\_\_\_\_  
Name or Number of Interpreter (if applicable)

Form I-203 (Rev. 09/10)

## **INTERACTING WITH LAW ENFORCEMENT OFFICERS ENGAGED IN CIVIL LAW ENFORCEMENT (PROTECT ACT)**

In [Name] Public Schools, we recognize the importance of all students being known and valued, and we promote a safe, inclusive, and welcoming learning environment for all students. All of our students have a right to a free public education regardless of race, color, sex, gender identity, religion, national origin, immigration or citizenship status, disability, or sexual orientation.

The PROTECT Act states, except as required by state or federal law or as required for the Commonwealth or its subdivisions to administer a state or federally supported or funded program, civil arrests for civil law enforcement, including federal immigration enforcement, are not allowed on school grounds during school hours, student drop off and pick up windows, before- and after-school programming and school-sponsored events without a Judicial Warrant or Judicial Order.

The Superintendent/Executive Director shall implement PROTECT Act procedures consistent with the Model Procedures and the Guidance for K-12 Schools Related to Interacting with Civil Law Enforcement issued by the Governor's Office, the Executive Office of Education, and the Department of Elementary and Secondary Education.

The procedures shall be implemented, wherever applicable, in alignment with District Emergency Operations Plans, Medical and Behavioral Health Emergency Response Plans, and the School Resource Officer Memorandum of Understanding.

These procedures will be designed in accordance with the guidance provided and promote schools that are safe and accessible for students, staff and residents, and shall include, but not be limited to:

- (i) Procedures for identifying and designating a senior administrator at each district superintendent's office or executive director's office, as the case may be, to serve as the individual responsible for having primary contact with law enforcement agents engaged in civil law enforcement for the school system and the central point of contact for schools on interactions with civil law enforcement;
- (ii) Procedures for identifying and designating a senior administrator at each school to serve as the individuals responsible for having primary contact with law enforcement agents engaged in civil law enforcement who arrive on site at the school or request information about students, employees, or other persons affiliated with the school;
- (iii) Procedures for contacting the school district's attorney;

- (iv) Procedures for contacting the senior administrator at the school and the district superintendent/executive director's office in the event law enforcement agents engaged in civil law enforcement arrive on school grounds or request information about students, employees, or other persons affiliated with the school;
- (v) Procedures for documenting all interactions with law enforcement agents engaged in civil law enforcement while on school grounds;
- (vi) Procedures for notifying a student's parents or guardian or the student directly if the student is 18 years or older or emancipated, if a law enforcement agent engaged in civil law enforcement requests access to a student or student's information for any civil law enforcement purpose;
- (vii) Procedures following the confirmation of law enforcement agents engaged in civil law enforcement on school grounds, including notifying parents and guardians, teachers, administrators, and school personnel;
- (viii) Procedures to confirm and update students' emergency contacts, with allowance for more than one person to be listed, and alternative caregiver plans; and
- (ix) A plan to share these procedures with students and families on the school district's website.

Once adopted by a school district, charter school or collaborative school, this policy and the accompanying procedures shall constitute the written emergency response plan required by the Act.

CROSS REFS.:       EBC, EMERGENCY PLANS  
                           ECA, BUILDINGS AND GROUNDS SECURITY  
                           ECAF, SECURITY CAMERAS IN SCHOOLS  
                           JIH, SEARCHES AND INTERROGATIONS  
                           JRA, STUDENT RECORDS  
                           KI, VISITORS TO THE SCHOOLS  
                           KLG, RELATIONS WITH POLICE AUTHORITIES

LEGAL REFS.:       PROTECT Act, August 2026

SOURCE: MASC adapted from Massachusetts Department of Elementary and Secondary Education  
 -August 2026

**NOTE: The Department of Elementary and Secondary Education, in consultation with the Office of Refugees and Immigrants and the Attorney General's Office, will release a model training relating to the implementation of these procedures. Schools are encouraged to share this training, once released, with managers and other staff.**



**Sudbury Public Schools  
School Committee Meeting**

**Date:** September 14, 2026

**Agenda Item:** 5 - Future Agenda Items

**Recommendation:**

**Background / Preparation Information:**

This portion of the meeting is an opportunity for members to ask the chair to add items to the rolling agenda. Per OML, there cannot be discussion of any item being requested or any item currently on the rolling agenda. It is also not a discussion of when items might be placed on the agenda. Items requested at a meeting or via email are added to the table. The rolling agenda is not a final version of the agenda items for the year and is subject to change based on conversations between the Chair and the Superintendent.

**Attachments:**

'26-'27 Committee Rolling Agenda (1)

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

# **‘26-’27 Committee Rolling Agenda**

## **September 28, 2026 (Remote)**

Haynes and Nixon roof update - if needed  
Budget Reset (FY27)  
Budget Guidelines Technology memo  
Review Educator Absentee Data for Calendar  
Vote on Superintendent Goals  
Vote on SC Goals  
Monthly Accounts Payable and Payroll Warrants Submission  
Elementary Spanish Program Review  
Step 2 JLCD Administration of Medication of Students  
    JLDC Self Administration and Self-Carry of Medication  
    JKAA  
    ACL PROTECT Act  
Mass CEC School Bus Advisory Services Program  
Liaison Reports  
Minutes  
**SEA Rep: Angela Spirito**

## **October 19, 2026 (Hybrid)**

2027-2028 School Calendar  
CASE Q1 Report  
ACCEPT Q1 Report  
NESDEC Enrollment Projections (if ready)  
FY27 Capital Projects  
Future Agenda Items  
Monthly Accounts Payable and Payroll Warrants Submission  
Minutes  
**SEA Rep: Ellen Vedora**

## **November 2, 2026 (Remote)**

NESDEC Enrollment Projections  
MCAS Report  
SC Budget Priorities and Budget Letter  
Liaison Reports  
Minutes

**SEA Rep: Peter Ferguson**

## November 16, 2026 (Hybrid)

School Improvement Plans (11/3/25)  
MetroWest Health Study  
Discussion to prioritize initiatives (Budget Letter)

Future Agenda Items  
Monthly Accounts Payable and Payroll Warrants Submission  
Minutes

**SEA Rep: Anneke Bartelsman**

## November 30, 2026 (Remote) - BUDGET REVIEW

SC Budget Priorities  
School Improvement Plans

Minutes

**SEA Rep:**

## December 7, 2026 (Hybrid) - BUDGET REVIEW

Student Services Report

FY28 Budget Planning

- TM Budget Guidance
- Review Budget Drivers
- SC Budget Timeline

Liaison Reports

**SEA Rep:**

## December 14, 2026 (Hybrid) - BUDGET HEARING

Budget Hearing (Special Matter)  
FY28 Budget Workshop and Review  
Superintendent's Recommended FY28 Budget Workshop (with principals)  
Superintendent's FY28 Recommended Budget Vote

Future Agenda Items  
Monthly Accounts Payable and Payroll Warrants Submission  
Minutes  
**SEA Rep:**

## January 11, 2027 (Remote)

Executive Session - review any ES minutes and determine release  
FY28 Budget Workshop and Review  
FY28 Capital Updates and Town Meeting Warrant Articles  
At-A-Glance  
Liaison Reports  
Minutes  
**SEA Rep:**

## January 25, 2027 (Remote)

CASE Collaborative Q2 Report  
ACCEPT Collaborative Q2 Report  
Budget Book Approval  
FY28 Q2 YTD Budget Update  
Superintendent Mid-Year Report  
SPS Town Report (2026)  
  
Future Agenda Items  
Monthly Accounts Payable and Payroll Warrants Submission  
Minutes  
**SEA Rep:**

## February 8, 2027 (Remote)

SC Goal Review  
SC Self Assessment  
March Tri-District Meeting Planning  
Legislative Forum Discussion  
Student Fees for FY28  
FY27 Capital Updates and Town Meeting Warrant Articles  
Monthly Accounts Payable and Payroll Warrants Submission  
  
Liaison Reports



## March 1, 2027 (Hybrid)

SC Meeting Schedule for FY28  
PBC Appointment (term ends 5/5)  
Per Policy Handbook page 13 - PAC liaison written memo for packet

Future Agenda Items  
Minutes  
**SEA Rep:**

## March 15, 2027 (Remote)

Legislative Forum  
Hearing on School Choice

Liaison Reports  
Monthly Accounts Payable and Payroll Warrants Submission  
Minutes  
**SEA Rep:**

## March 29, 2027 (in person) In Boston

Needs to start at 6:00 p.m. as the Kroc Center closes at 8:00 p.m.  
Special Matters - METCO Yearly Report

**SEA Rep: None**

## April 12, 2027 (Hybrid)

Special Matters - Academic Benchmarking (Wellness, ELA and Math)  
CASE Q3 report  
Accept Q3 Report  
School Committee Self Evaluation

Future Agenda Items  
Monthly Accounts Payable and Payroll Warrants Submission

Minutes  
**SEA Rep:**

## May 3, 2027 (Annual Town Meeting)

Liaison Reports  
Minutes

## May 24, 2027 (Hybrid)

FY27 Q3 YTD Budget Update  
PACs end of year update  
School Committee Reorganization  
Discuss & approve charge of subcommittees: Policy, Communication, Calendar, etc.

Superintendent Annual Report (Summative)

Future Agenda Items  
Monthly Accounts Payable and Payroll Warrants Submission

Minutes  
**SEA Rep:**

## June 7, 2027 (Remote)

Special Matters - School AIM Reports - Principals  
DC Trip Approval  
FY27 Superintendent Evaluation  
At-A-Glance Newsletter

Liaison Reports  
Minutes

**SEA Rep:**

## June 21, 2027 (Hybrid)

Review ES minutes for release to public if requested - put on meeting in July and January  
Draft Superintendent Goals  
School Committee Goals

Future Agenda Items  
Monthly Accounts Payable and Payroll Warrants Submission

## Minutes

### July 19, 2027 (Hybrid) - WORKSHOP

FY27 End of Year Annual Budget Report

CASE Q4 Report

Accept Q4 Report

School Committee Goals

Superintendent Goals

Liaison Reports

Monthly Accounts Payable and Payroll Warrants Submission

Minutes

| <u>Date Requested</u>          | <u>Requested by</u>     | <u>Item Requested</u>                                 | <u>Date added to Agenda</u>          |
|--------------------------------|-------------------------|-------------------------------------------------------|--------------------------------------|
| May 2026                       | Community member        | Jewish PAC                                            | August 3<br>August 17                |
| 05/24/26                       | Karyn                   | Follow up to equity audit                             |                                      |
| 06/01/26                       | Julie and Ellen         | Jewish PAC                                            | August 3<br>August 17                |
| 06/03/26                       | Karyn                   | METCO goals                                           |                                      |
| 06/09/26                       | Karyn                   | Sandra and Victor attend meeting for project timeline | Potentially Sept 28                  |
| 06/14/26                       | Jessica                 | SC banner/supplies for community events               |                                      |
| 06/15/26                       | Karyn                   | District Process regarding student behavior           | Handled by Task Force<br>Aug 17 (SC) |
| 06/01/26                       | Jessica/Andy            | Continue MOA work                                     | August 3                             |
| 06/15/26                       | Karyn                   | Executive Session to Discuss contract renewals        |                                      |
| 07/16/26                       | Karyn                   | Continue MOA work                                     | August 3                             |
| 08/03/26                       | Ellen and Julie         | Task Force Presentation on Jewish PAC                 | August 17                            |
| 08/03/26                       | Julie                   | Setting up criteria for PAC                           |                                      |
| 08/03/26                       | Committee               | Thank Carmine Gentile for his donation                | Sept 14                              |
| 08/07/26                       | Community member        | Reopen calendar/religious observance discussion       |                                      |
| 08/09/26                       | Karyn                   | Review of Policy IHGB Homeschooling                   |                                      |
| 08/10/26<br>8/19/26<br>8/21/26 | Ellen<br>Betsy<br>Karyn | Presentation from Sudbury for Digital Balance         |                                      |
| 8/21/26                        | Karyn                   | Artificial Intelligence Guidelines                    |                                      |
| 8/27/26                        | Karyn/MASC/Attorney     | Policy ACL PROTECT Act                                | Sept 14                              |