



Acton-Boxborough
Regional School District



Bedford Public Schools



Carlisle Public Schools



Concord Public Schools



Concord-Carlisle
Regional School District

CASE COLLABORATIVE

BOARD OF DIRECTORS MEETING

DECEMBER 8, 2023



Harvard Public Schools



Lincoln Public Schools



Lincoln-Sudbury
Regional School District



Sudbury Public Schools



Littleton Public Schools



Maynard Public Schools

BOARD OF DIRECTORS MEETING

December 8, 2023

12:30 PM

LOCATION

Ripley Building, 120 Meriam Road, Concord, MA 01742
Conference Room 4

AGENDA

- I. CALL TO ORDER**
- II. APPROVAL OF MINUTES**
 - A. Board of Directors Meeting: Sept 22 and Nov 2, 2023 (Vote Required)
- III. PUBLIC COMMENTS**
- IV. REPORTS OF THE EXECUTIVE DIRECTOR**
 - A. Personnel Report (Information Only)
 - B. Treasurer's Report (Information Only)
- V. KEY BUSINESS**
 - A. Approval of FY23 Annual Report (Vote Required)
 - B. Approval of FY23 Audit (Vote Required)
 - C. Approval of FY23 Cumulative Surplus (Vote Required)
 - D. Acton DPW - Fuel Tank Replacement Capital Plan (Discussion Only)
 - E. Approval of Resolution of FY23 Cumulative Surplus (Vote Required)
 - F. Potential Change of Health Insurance Carrier/
Potential Withdrawal from MNHG (Vote Required)
 - G. Director of Finance Interview (Discussion Only)
- VI. EXECUTIVE SESSION**
 - A. Roll call vote to enter into Executive Session
 - B. Executive session pursuant to M.G.L. c. 30A, s. 21(a)(7) to comply with, or act
under the authority of, any general or special law (approval of executive session
minutes for the sessions held on Sept 22 and Nov 2, 2023) (Vote Required)
 - C. M.G.L. c. 30A, s. 21(a)(3): To discuss strategy with respect to collective bargaining
with the CASE Education Association if an open meeting may have a detrimental
effect on the bargaining position of the public body and the chair so declares
(*Certain Support Staff*) (Vote Required)
 - D. M.G.L., c. 30A, s. 21(a)(2): To discuss strategy sessions in preparation for
negotiations with non-union personnel and to conduct contract negotiations
with non-union personnel (*Finance Director*) (Vote Required)
 - E. Roll call vote to return to Open Session
- VII. ADJOURNMENT**

The matters listed above are those reasonably anticipated by the Chair that 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.

DRAFT

Minutes of CASE Board of Directors Meeting of September 22, 2023

Board Members in Attendance:

Peter Light, Acton-Boxborough (arr: 12:41 pm)
Cliff Chuang, Bedford (arr: 1:11 pm)
James O'Shea, Carlisle
Laurie Hunter, Concord, Concord/Carlisle, Chairperson
Linda Dwight, Harvard

Parry Graham, Lincoln
Andrew Stephens, Lincoln-Sudbury (arr: 12:38 pm)
Brian Haas, Maynard
Brad Crozier, Sudbury

Also in Attendance:

Sanchita Banerjee
George McCormack

Members of the CASE Community

MINUTES:

At 12:33 p.m., Laurie Hunter called the meeting to order.

A motion was made by Linda Dwight to approve the minutes of May 19, 2023. The motion was seconded by Brad Crozier. The motion was unanimously approved. All in favor.

Public Comments: No public comments were made.

Students from the TIP and Empower programs at Colebrook, along with their teachers, shared a program "Starts with Hello" which was started at Colebrook School this year based on the Sandy Hook Promise. This program helps students feel a lot less isolated. Students made and handed out beaded bracelets for Board members.

The Personnel Report was presented by George McCormack. A motion was made by Brad Crozier to accept the Personnel Report as presented. The motion was seconded by Parry Graham. The motion was unanimously approved. All in favor.

The Treasurer's Report was presented by George McCormack. There were no questions.

A motion was made by James O'Shea to accept Concord Superintendent as CASE Board's Representative to approve warrants for FY24. Brian Hass seconded the motion. The motion was unanimously approved. All in favor.

A motion was made by Cliff Chuang to accept Linda Dwight, James O'Shea and Peter Light as CASE Board's Representatives on the Professional Teachers Association Negotiations Subcommittee. The motion was unanimously approved. All in favor.

DRAFT

A motion was made by Andrew Stephens to accept Kelly Clenchy, James O'Shea and Brad Crozier as CASE Board's Representatives on Certain Support Staff Negotiations Subcommittee. Peter Light seconded the motion. The motion was unanimously approved. All in favor.

It was agreed to hold on selecting Board members as CASE Board's Representative on the Policies Subcommittee.

George McCormack gave an update on the Auditing Firm for CASE. On January 3, 2023, Melanson P.C. was purchased by Marcum LLP. Marcum LLP is a national auditing and advisory firm founded in 1951 and employs close to 3,000 people.

A motion was made by Peter Light to approve a \$500 incentive for any employee that refers a Teaching Assistant. Further, new Teaching Assistants will receive a \$500 sign-on incentive. The incentive expires when the Collaborative has employed a net of six new Teaching Assistants or on June 30, 2024, whichever comes first. Cliff Chuang seconded the motion. The motion was unanimously approved. All in favor.

The current Treasurer, Ian Rhames, is moving on to another position in the private sector and no longer has the time commitment to act as the CASE Treasurer. CASE would like to propose the appointment of Allison Letizi as CASE's next Treasurer. Ms. Letizi is the Treasurer for the Concord/Carlisle Regional School District, in addition, she was the former CASE Treasurer approximately 20 years ago. She has the necessary qualifications to be successful. This recommendation is being put forth to the Board.

A motion was made by Peter Light to appoint Allison Letizi as CASE's next Treasurer. Brian Haas seconded the motion. The motion was unanimously approved. All in favor.

At 1:32pm., a motion was made by Linda Dwight to enter into Executive Session for the purpose to discuss strategy with respect to collective bargaining with the CASE Education Association if an open meeting may have a detrimental effect on the bargaining position of the public body and the chair so declares (Teachers and Certain Support Staff), and not return to open session. Andrew Stephens seconded the motion. The motion was unanimously approved by roll call vote: Dwight, aye; Crozier, aye; Graham, aye; Chuang, aye; Light, aye; Stephens, aye; O, Shea, aye; Hunter, aye.

DRAFT

Minutes of CASE Board of Directors Virtual Meeting of November 2, 2023

Board Members in Attendance:

Peter Light, Acton-Boxborough
Cliff Chuang, Bedford (arr: 3:04 pm)
James O'Shea, Carlisle
Laurie Hunter, Concord, Concord/Carlisle, Chairperson

Linda Dwight, Harvard
Parry Graham, Lincoln
Kelly Clenchy, Littleton

Also in Attendance:

Sanchita Banerjee
Melissa Devine

George McCormack
Russell Dupere

MINUTES:

At 3:03 p.m., Laurie Hunter called the meeting to order and made a motion to enter into Executive Session to discuss strategy with respect to collective bargaining with the CASE Professional Association (Teachers) if an open meeting may have a detrimental effect on the bargaining position of the public body and the chair so desires, and to return to open session. Kelly Clenchy seconded the motion. The motion was unanimously approved by roll call vote: Clenchy, aye; Dwight, aye; Graham, aye; Light, aye; O'Shea, aye; Hunter, aye;

At 3:13 pm., the Board returned to open session.

A motion was made by Linda Dwight to accept the agreement between the CASE Professional Association and the CASE Collaborative dated July 2023 - 2026 as presented. Kelly Clenchy seconded the motion. The motion was unanimously approved by roll call vote: Chuang, aye; Clenchy, aye; Dwight, aye; Graham, aye; Light, aye; O'Shea, aye; Hunter, aye.

At 3:14 p.m., the Board adjourned the meeting.

BOARD OF DIRECTORS MEETING – December 8, 2023

AGENDA ITEM: IV. A.

Approval of Personnel Report

 X

Vote Requested

Information Only

Facilitator:

George McCormack, *Director of Finance and Operations*

Recommended Motion:

Move to accept the personnel report as presented

PERSONNEL CHANGES FROM SEPTEMBER 16, 2023 - DECEMBER 1, 2023			
NAME	START DATE	END DATE	POSITION
Bruno Coelho Kelly, Stephane	11/27/2023		Driver
Cerezo, Patricia		10/27/2023	ABA Tutor
DeArruda, Natally		10/25/2023	Administrative Assistant
Diaz, Jose	9/25/2023		Driver
Erickson, Carl		11/8/2023	Teaching Assistant
Erickson, Carl	11/9/2023		ABA Tutor
Gonzalez, Marvin	11/27/2023		Custodian
Guzman, Roland	10/23/2023		Teaching Assistant
Hiche, Elena		11/15/2023	Driver
Koromhas, Francineide		9/22/2023	Teaching Assistant
Mayer, Lawrence	9/18/2023		ELA Teacher
Munroe, Kimberly	10/23/2023		Team Chair
Naylor, Patricia	11/2/2023		Administrative Assistant
Nieves Adorno, Emanuel	11/13/2023		Driver
Norton, Jodi		10/27/2023	Teaching Assistant
Plett, Leslie	11/29/2023		Driver
Rodriguez, Hector	10/18/2023		Driver
Shatzer, Anna	10/30/2023		Teaching Assistant
Sherwin, Michele		10/5/2023	Team Chair
Velasquez Bonilla, Luis	11/1/2023		Driver
Watts, Jean	9/29/2023		SLP Teacher
Willis, Lynne		10/12/2023	Driver

BOARD OF DIRECTORS MEETING – December 8, 2023

AGENDA ITEM: IV. B.

Treasurer's Report

Vote Requested

 X

Information Only

Facilitator:

George McCormack, *Director of Finance and Operations*

INFORMATION:

The Board will be presented with the treasurer's report at this meeting.

**Treasurer's Cash Report
 9/1/2023 - 10/31/23**

<u>Operating cash 8/31/23</u>	4,619,666
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Cash Inflows:

Receipts, Tuitions, Interest, etc	1,273,724
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Cash Outflows:

Payroll	-1,676,323
Accounts Payable	-544,131

<u>Operating cash 10/31/23</u>	3,672,936
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Prepared by:
 Allison Letizi
 CASE Treasurer
 11/27/2023

BOARD OF DIRECTORS MEETING – December 8, 2023

AGENDA ITEM: V. A. *Approval of FY23 Annual Report*

 X

Vote Requested

Information Only

Facilitator: *Sanchita Banerjee, Executive Director*

Recommended Motion: *Move to accept CASE's Annual Report for the year ending June 30, 2023
as presented*

INFORMATION:

A vote to accept the annual report is requested.

CONCORD AREA SPECIAL EDUCATION (CASE) COLLABORATIVE

ANNUAL REPORT 2022-2023



CASE collaborative

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(Celebration of Student Achievement)

Letter from Executive Director

Dear Members,

This past year, the services of Concord Area Special Education (CASE) Collaborative were based on its core values of Caring, Excellence, and Collaboration. The incredible CASE staff, whether in our classrooms, in our vans, or in our offices, demonstrated a commitment to providing high quality services to our students and families.

This Annual Report offers a review of CASE's accomplishments during the past year. We served students in our *special education programs* in a variety of settings - in public schools and in our Approved Public Day setting. CASE had the distinction of providing services at all levels, from preschool all the way through post high school. The primary disabilities of students at CASE included those with severe developmental, cognitive, and medical needs, developmental disabilities, autism spectrum disorder, and social emotional disabilities.

As part of our *transportation* service to our members, we transported students to 41 locations in towns all over the commonwealth. Our Transportation Department was required to continually adapt its services with very short notice based on the specific circumstances as a result of the pandemic. These changes were obviously challenging but the staff never wavered in their professionalism or commitment to maintaining student safety.

The CETT team played a prominent role during the past school year in *consultation, education, and training in technology*. The Mission of the CASE CETT Team is to support the use of Assistive Technology (AT) and Alternative-Augmentative Communication (AAC) for students from the CASE Collaborative communities and local school districts.

The CETT Team strives to provide guidance, support and consultation to educational teams in the selection and use of appropriate assistive technology and AAC systems, with the goal of helping students access the curriculum, meet individual educational goals, and communicate functionally and meaningfully. We made other important strides in technology, including a weekly newsletter focused primarily on sharing tech tools and resources with staff.

Despite all the challenges we faced on a regular basis, our flexibility and creativity were born out of our commitment to our students, families, and staff. As we look back on our

accomplishments, we are justifiably proud of the way we navigated the 2022-2023 school year as a collective whole.

Sincerely,

Sanchita Banerjee

Executive Director



(Preschool Graduate in LFL Program in Davis School, Bedford)



(Elementary School Graduate in Davis School, Bedford)

Nurturing and Inspiring Every Child to Learn and Grow

About Us

For 45 years, Concord Area Special Education (CASE) Collaborative has been an organization that allows school districts to plan, develop and implement programs for students with special needs. It affords school districts the opportunity to augment local services and provide a continuum of special education programs through collaboration with member school districts. It provides a mechanism for people to share ideas and resources for the purpose of meeting a common need.

CASE is an educational collaborative agency made up of 11 regional and municipal districts serving the Greater Boston metropolitan area. CASE is governed by a board of directors comprised of ten school superintendents representing each of its member school districts. CASE was formed in 1974 to meet regional needs of member school districts. The main, although not exclusive, focus of CASE Collaborative is children and young adults who require special education.



Mission of CASE Collaborative

CASE Collaborative's mission is to maximize the full potential of students with disabilities in enriched and supportive academic, social, recreational, and vocational environments.

Purpose of CASE Collaborative

CASE Collaborative is an education collaborative established in 1974 to meet the regional needs of member school districts in the areas of special education programming and transportation. Comprised of eleven regional and municipal school districts serving the Greater Boston metropolitan area, CASE is governed by a Board of Directors consisting of the superintendents of member districts. The current CASE Collaborative Agreement was approved by the Massachusetts Department of Elementary and Secondary Education (DESE) on November 20, 2015. As stated in the Collaborative Agreement, CASE's primary purpose is to "jointly conduct regional educational programs and services on behalf of member school committees."

Working collaboratively with CASE allows school districts to plan, develop, and implement programs for students with disabilities. CASE programs afford school districts the opportunity to provide a full continuum of special education services to meet the needs of a wide range of students. Additionally, CASE offers special education transportation services to member districts, and technology consultation. Further, parent engagement is an integral component of the Collaborative.



(Individualized Learning in the LFL Program at Colebrook School)

CASE Board of Directors for 2022-2023

MEMBER DISTRICTS	SUPERINTENDENT
Acton – Boxborough	Peter Light
Bedford	Philip Conrad
Carlisle	James O'Shea
Concord	Laurie Hunter (Chair)
Concord-Carlisle	Laurie Hunter (Chair)
Harvard	Linda Dwight
Lincoln	Rebecca McFall
Lincoln-Sudbury	Bella Wong
Littleton	Kelly Clenchy
Maynard	Brian Haas
Sudbury	Brad Crozier (Vice-Chair)



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Key Management and Program Staff

NAME	ROLE
Sanchita Banerjee	Executive Director
Melissa Devine	Assistant Director
George McCormack	Directors of Finance and Operations
Kim Munroe	Principal/Program Administrator
Martin Finnegan	Transportation Administrator
Regina Erickson	Coordinator of Projects
Ian Rhames	Treasurer

CASE Collaborative Address

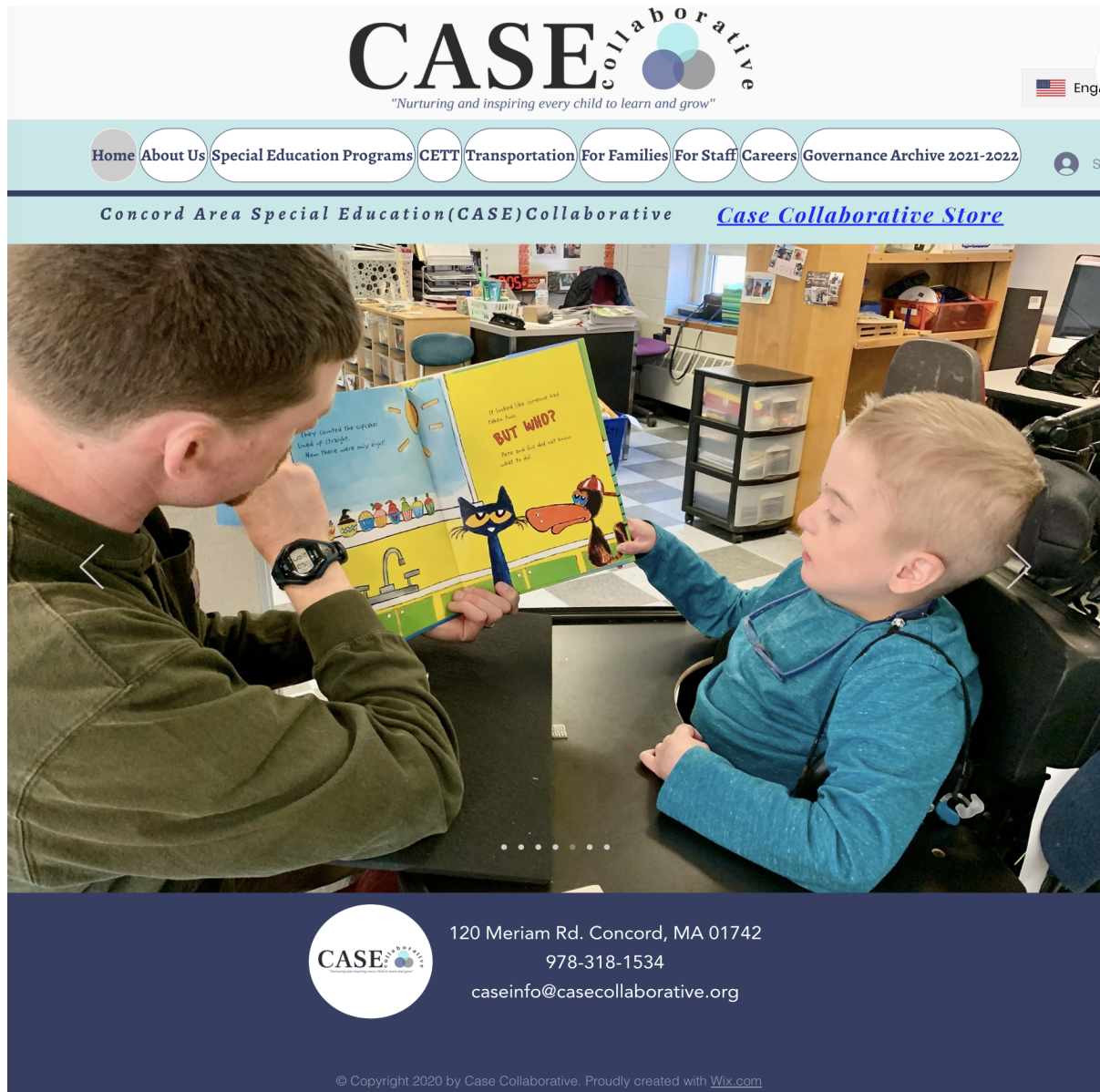


120 Meriam Rd. Concord, MA 01742

978-318-1534

caseinfo@casecollaborative.org

Web Address for CASE Collaborative



The screenshot shows the homepage of the CASE Collaborative website. At the top, the logo features the word "CASE" in large, bold, black letters, with "collaborative" in a smaller, grey, sans-serif font to its right. Below the logo is the tagline "Nurturing and inspiring every child to learn and grow". To the right of the logo is a small American flag icon and the text "Eng". Below the logo is a horizontal navigation bar with several circular buttons: "Home", "About Us", "Special Education Programs", "CETT", "Transportation", "For Families", "For Staff", "Careers", and "Governance Archive 2021-2022". Below the navigation bar is a teal banner with the text "Concord Area Special Education (CASE) Collaborative" and a link to the "Case Collaborative Store". The main content area features a large photograph of a man in a green jacket reading a colorful children's book to a young boy in a blue shirt. The book has illustrations of a cat and a dog. Below the photograph is a row of five dots, with the fourth dot being larger than the others. At the bottom of the page is a dark blue footer containing the CASE Collaborative logo, the address "120 Meriam Rd. Concord, MA 01742", the phone number "978-318-1534", the email "caseinfo@casecollaborative.org", and the copyright notice "© Copyright 2020 by Case Collaborative. Proudly created with Wix.com".

CASE collaborative
"Nurturing and inspiring every child to learn and grow"

Home About Us Special Education Programs CETT Transportation For Families For Staff Careers Governance Archive 2021-2022

Concord Area Special Education (CASE) Collaborative [Case Collaborative Store](#)

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caseinfo@casecollaborative.org

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<https://www.casecollaborative.org/>

Nurturing and Inspiring Every Child to Learn and Grow

SERVICE TO COMMUNITIES

Special Education Programming

All CASE programs are staffed with licensed teachers, teaching assistants, Registered Behavior Technicians, Board Certified Behavior Analysts, Counselors, Occupational Therapists, Speech and Language Pathologists, Physical Therapists, and other related service therapists, including reading specialist, teachers of the visually impaired, orientation and mobility therapists, assistive technology and AAC specialists. The specific mix of professionals and services is dictated by the individual student's IEP.

Programs are available as school year programs, supplemented by an Extended School Year program during the summer. Academic, behavioral, and diagnostic assessments are provided.

Be it in public schools or DESE approved public day setting, our programs offer inclusion opportunities and appropriate school activities that promote a full spectrum of meaningful experiences. Our programs allow students to benefit from the richness of a highly specialized and diverse team of faculty and staff.

Empower Program



Empower (EMP) is a specialized program that meets the needs of students with complex language and learning challenges. Students with a diagnosis of autism spectrum disorder, developmental disabilities, neurological disabilities, and intellectual disabilities are served in this program. Instruction is provided in whole class and small group formats based on grade and age level. This program offers curriculum based on curriculum standards set by DESE, and based on the principles of Applied Behavior Analysis, when appropriate. The curriculum is a blend of functional academics, social skills instruction, daily living skills, and intensive support from related service providers.

Empower utilizes a multi-sensory approach and provides lessons that integrate language, sensory, and social skills. A total communication approach is used to facilitate language development in the context of direct teaching and the natural environment. Staff address individual student needs with a focus on enhancing independence, self-reliance, responsibility, and social maturity. Assistive technology is integrated throughout the curriculum.

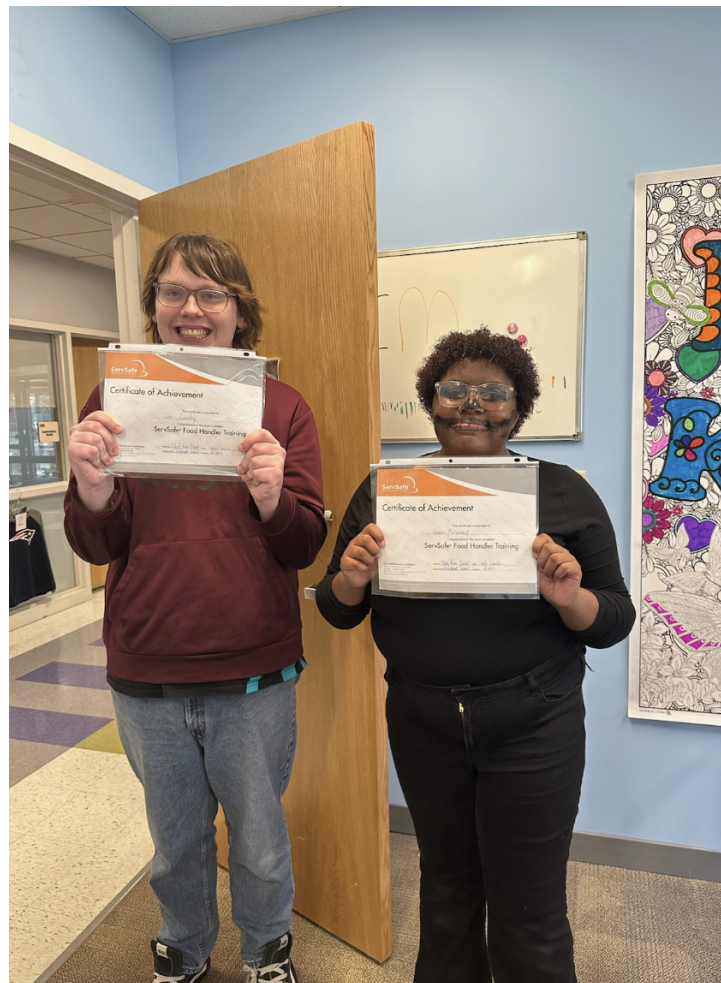
Learning for Life Program



Learning for Life (LFL) is a specialized program that addresses the many different cognitive, physical, medical, communication, and social needs of students. Instruction is individualized to address each student's unique needs. As appropriate, physical, visual, and verbal prompts, technology, and assistive devices are incorporated into each

student's program. The curriculum helps build independence and includes functional academics and daily living skills. Activities, materials, and instructional strategies are age and cognitively appropriate. LFL staff provide immediate feedback and provide numerous opportunities to maintain and generalize academic and life skills. Students in this program are provided extensive opportunities to demonstrate independence and self-advocacy skills, engage in social interactions, access community resources, and beginning at age 14, acquire and practice vocational skills in a multitude of community settings.

Therapeutic Intervention Program



The Therapeutic Intervention Program (TIP) is a specialized program that meets the needs of students experiencing mental health issues, school adjustment issues, trauma history, behavioral and social challenges, and other issues interfering with accessing grade-level curriculum and making substantial progress.

TIP offers a supportive environment to students with average to above-average cognitive profiles. Programs are developed based on students' grade and skill levels utilizing engaging curriculum to meet the specific needs of the students, who are held to

high academic standards. The rigorous curriculum outlines clear learning outcomes with matching assessments. Clinical support is provided in both individual and group modalities. All related services are available as necessary for all students; vocational and transition services are provided to students age 14 and older.

Extended School Year Services



(A Productive and Engaging ESY Program Based in Concord Public School)

A five-week summer option was available for students whose IEPs called for an extended year program. The CASE Extended Year Program typically addresses the students' IEP goals and benchmarks over the summer in much the same manner as the regular school year program. All district classrooms were programmed at the Thoreau School in Concord and the programs at Colebrook School remained in Acton. Students participated in academic instruction, community trips, and social skills activities. The Thoreau Club welcomed CASE back for a weekly swim trip.

Staffing and Services in CASE Programs

- Special Education Teachers
- Teaching Assistants
- ABA Tutors
- Board Certified Behavior Analysts
- School Counselors
- Speech and Language Therapists
- Occupational Therapists
- Physical Therapists
- Teacher of the Visually Impaired
- Deaf/Blind Services
- Orientation & Mobility Services
- Consulting Teacher of the Deaf
- Nursing
- Reading Specialist
- EL Services
- CETT (Assistive Technology/AAC Services)
-

ADMISSION PROCESS FOR CASE PROGRAMS

CASE Collaborative works with partner school districts to accept students referred to our programs. Students typically have a current Individualized Education Program (IEP). CASE can provide an Extended Evaluation in programs. The admissions process is comprehensive in order to ensure that each child's program is designed to maximize potential.

Referral

We request that parents work with their school district to begin the referral process. This allows us to make the visit as productive as possible by guiding families to appropriate classrooms and services that are best for their child. It's helpful to have a complete referral packet in advance of a visit. However, there are some circumstances where the sending district may make a special request for a family to visit before all the paperwork has been shared with CASE Collaborative. To make a referral, CASE is contacted at caseinfo@case.org or 978-318-1534.

Intake Assessment Review

The process usually is completed within 72 hours of receipt of a packet.

Tours

Parents and students will meet with CASE staff and have an opportunity to meet with staff and students in the program. Parents tour the school building and observe classrooms in action. The visit lasts approximately one hour and concludes with an opportunity to ask follow up questions. Students are then invited back for a visit day that may be scheduled for an hour or a full day.

Suitability

Once the intake, parent tours and student visit days are complete, CASE Collaborative determines whether our program is a good fit and can address the unique learning, behavioral, and social/emotional needs of the student. A determination is sent to the sending district.

CARING

It starts the minute a student gets on the bus and it's the foundation of everything we do as a community. Caring means supporting, challenging and persevering. It means taking the time to identify and connect with each individual's unique qualities.

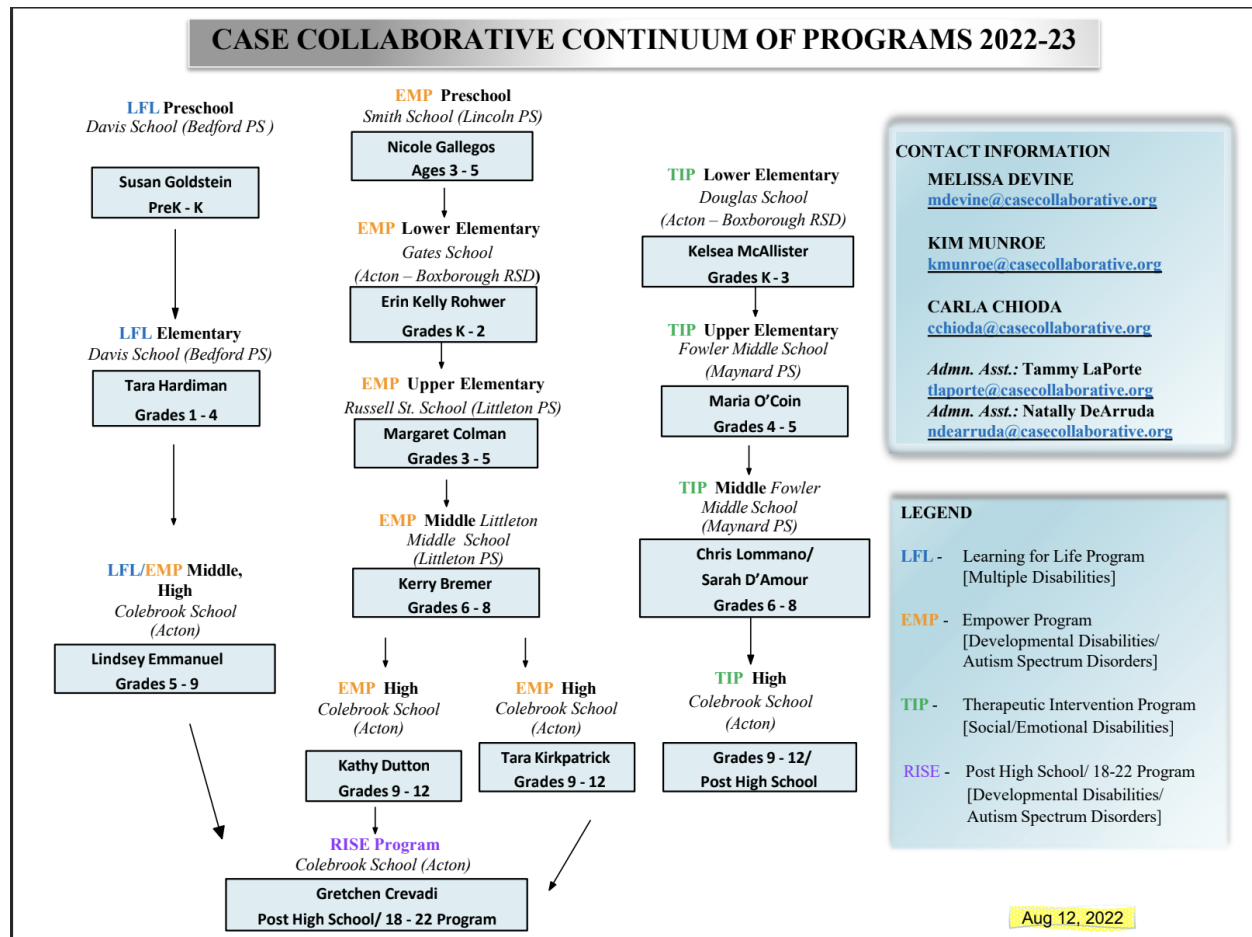
EXCELLENCE

We have high standards and set high expectations for our teachers and our students. There are always challenges. But we are resourceful and find new ways to support our student's growth.

COLLABORATION

Growth, learning and successful transitions flourish in a connected environment. Collaboration and communication are essential across our network: students and their families, drivers, teachers, therapists, administrators, host schools and the broader community.

Locations of CASE Collaborative Programs (2022-2023)



Nurturing and Inspiring Every Child to Learn and Grow

Cost Effectiveness: CASE Collaborative Programs

Once again, CASE undertook a market survey to ensure tuition rates for 2022-2023 were in line with similar programs offered by other educational services providers. By maintaining competitive rates, we are able to attract students without sacrificing the quality of our programs.

Cost Effectiveness:

Empower Program (EMP)

CASE Collaborative	\$75,000
Non-CASE Programs - "Equalized" average total tuition - 180 days	\$98,896

Comparable Programs include: Community Therapeutic, Protestant Guild, Cardinal Cushing

Cost Effectiveness:

Learning for Life - INTENSIVE Program (LFL)

CASE Collaborative	\$80,000
Non-CASE Programs - "Equalized" average total tuition - 180 days	\$109,314

Comparable Programs include: BC Campus Crooked Mountain (NH) Franciscan's Hospital, Perkins Multi-Impaired, Perkins Severely Impaired

Cost Effectiveness:

Therapeutic Intervention Program (K - 8) (TIP)

CASE Collaborative	\$62,000
Non-CASE Programs - "Equalized" average total tuition - 180 days	\$84,282

Comparable Programs include: Walker School, Community Therapeutic, Dearborn, Italian Home, Judge Baker

Cost Effectiveness:

Colebrook TIP High School - Approved Public Day Social Emotional Program

CASE Collaborative	\$62,000
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Non-CASE Programs - "Equalized" average total tuition - 180 days \$73,497

Comparable Programs include: McLean Hospital, Arlington; Milestones, Walker, Beacon High, James Farr Academy, New England Academy, JRI, Victor School

Cost Comparison to Private Schools Offering Similar Programming

	Cotting School	Franciscan Children's Hospital	May Institute	Nashoba Learning Group	New England Center for Children	League School of Boston	Schools For Children	Private Schools Average	Mem % Savings From Avg.
CASE LFL (DD-INT) \$444.44	536.58	\$491.20						\$513.89	14%
CASE Empower (ASD/DD) \$416.66			\$545.72	\$429.20	\$567.21			\$514.04	19%
CASE TIP (SE) \$344.44						\$425.16	\$418.51	\$421.83	19%



Nurturing and Inspiring Every Child to Learn and Grow

CASE COLLABORATIVE PROGRAM ENROLLMENT (SY 2022-2023)

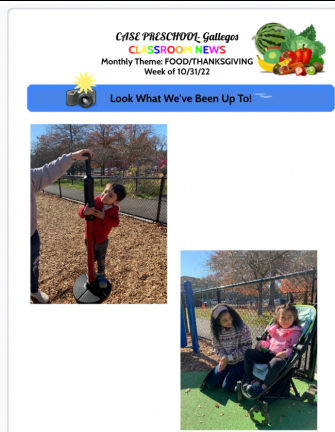
School District	Enrollment (10/1/2022)	Mid-Year Admissions	Mid-Year Terminations	Enrollment (6/30/2023)
Acton/Boxborough	11	2	1	12
Bedford	2		1	1
Carlisle	1		0	1
Concord	2	1	0	3
Concord/Carlisle	2		0	2
Harvard	10	2	1	11
Lincoln & Linc/Hanscom	12	2	1	13
Lincoln/Sudbury	4	2	1	5
Littleton	3	2	2	3
Maynard	2	3	0	5
Sudbury	1	0	0	1
Non-Member Districts	50	14	13	51
TOTAL	100	28	20	108

CASE COLLABORATIVE STUDENTS BY GRADE LEVEL (SY 2022-2023)

School District	Pre-School	Elementary	Middle School	High School	Post High School
Acton/Boxborough	4	3	2	4	1
Bedford		1	1		
Carlisle			1		
Concord		1	2	1	
Concord/Carlisle				2	
Harvard		2	1	9	
Lincoln & Linc/Hanscom	6	5	2		
Lincoln/Sudbury				4	1
Littleton		2	1	1	
Maynard	1	1	1	2	
Sudbury			1		
Non-Member Districts	3	14	12	17	1
TOTALS	14	29	24	40	3



4



5



6

(Student Centered Programming)

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SERVICE TO MEMBER DISTRICTS

Transportation



In any given year, CASE Transportation typically provides special education transportation services to public and private special education programs from our member districts, covering over one million miles a year. We were transporting approximately 350 students during this school year. During this time of a critical driver shortage, we have long known of the strength of this department and commitment of its members, but this year was yet another example of going above and beyond. Creative thinking, flexibility, and adaptability are just a few areas in which the department shone. The willingness of the Transportation Department staff to do what needed to be done, allowed us to maintain the employment of all of our drivers even though the number of students being transported varied from day to day.

The financial assessment is based upon transporting a student to and/or from school on a set schedule. Every effort is made to contain costs while providing safe transportation for students. The Transportation office consolidates runs within the constraints of a student's IEP. District requests that could impact costs include factors such as: the need for wheelchair/lift vans, requirements for time in transport to be less than required by regulation, additional wait time on pick up or drop off, multiple pick-up and drop off schedules to the same location, monitors, accommodating service animals, medical support personnel accompanying the student, and requests for additional vans to separate students, as well as other unique requirements. CASE Transportation works closely with districts and the school program the student attends to define and implement positive behavioral supports for students as needed and to provide maximum efficiency in consolidated routes, as appropriate. In many cases, this is unavoidable as a necessary component of the student's IEP; however, adjustments are considered and implemented on a regular basis.

Transportation Cost Effectiveness

CASE Transportation provides special education transportation services only to students living in CASE member communities; currently CASE provides such services to nine districts. In addition to its commitment to providing safe, efficient, and courteous transportation for students with disabilities, CASE Transportation maximizes efficiency

and minimizes cost by effective routing which enhances vehicle capacity. One of the largest cost factors for special education transportation is the specialized nature of the service. When a district sends only one or two students to a particular destination, the fee reflects the entire cost of the vehicle and labor. CASE Transportation reduces costs to its districts by combining students from various CASE communities on a single vehicle, even if the students are going to multiple destinations.

**Transportation Enrollment
2022-2023 - Annual Summary**

Students Transported	354
Programs Students Transported To	85
Number of Destinations (Towns)	41
Total Number of Routes	57
Routes with more than one student	56
Routes with students from more than one CASE district	53

SERVICE TO COMMUNITIES

Consultation, Education and Training for Technology (CETT)



Mission

The Mission of the CASE CETT Team is to support the use of Assistive Technology for students from the CASE Collaborative communities and local school districts. The CETT Team strives to provide guidance, support and consultation to educational teams in the selection and use of appropriate assistive technology that will help students access the curriculum and/or meet individual educational goals.

AT Assessments/Coaching

The CETT team provides assistive technology assessments on a timeline, assessments with trials and hourly coaching for individual students and classroom programs. The CETT Team's AT services address needs in many areas, including reading, written expression, and physical access to curriculum. Assessments include: observations, meeting with the special education Team to discuss possible assistive technology tools, training when necessary, field testing with a student and a written report summarizing recommendations. Coaching sessions are guided by the assistive technology needs of the student and the team. They often include observation of the student, a loan from our lending library if needed, training and brief notes of each meeting.

[AAC Assessments/Coaching](#)

The CETT Team provides assessments on a timeline as well as assessments with trials to support special educators and therapists in determining the most appropriate alternative-augmentative communication (AAC) system for their students. Hourly coaching sessions offer support and training to teams, aiding in assessing the effectiveness of devices and providing guidance and assistance with programming. Mid- and high-tech devices, ranging from single message switches to dynamic display devices, are available for loan through the CETT Team. Upon request, our team facilitates device rentals for trial periods, and helps families obtain private funding for the purchase of devices.

[CASE Classroom Consultations](#)

The CETT Team offers assistive technology support across all CASE classrooms. CETT aids special educators and therapists in choosing and training on assistive technology tools while serving as a knowledge hub for sharing resources.

Personalized AAC/AT support is designed to meet the distinct needs of each student or classroom. Previous instances have encompassed strategies such as integrating AT and AAC systems to meet IEP goals, aiding students with device-related technical support including programming, layout adjustments, and organizational considerations, as well as training on Clicker Apps and Speech Recognition. Assistance may take place in a single brainstorming session or ongoing monthly meetings to discuss assistive technology solutions. The CASE CETT Team is available to all CASE classrooms.

[Lending Library](#)

The CETT Team has an assortment of both low- and high-tech Assistive Technology tools in their lending library. The library has a range of software and hardware, including AAC devices that are available on a short-term loan basis. The purpose of this lending library is to provide educators and students with the opportunity to try products prior to purchasing them. The CETT Team is continuously reviewing new equipment on the market and making purchases, as appropriate, to ensure that current assistive technology and AAC tools are available for loan.

Assistive Technology Training

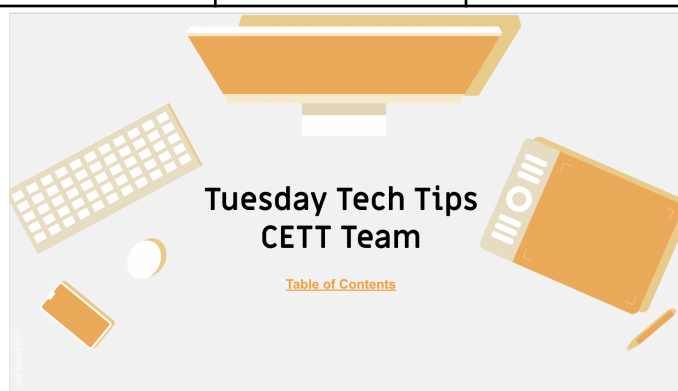
The CASE CETT Team provides workshops for staff and parents of students in CASE Collaborative classrooms who are interested in learning more about Assistive Technology. Staff workshops are scheduled yearly through the CASE Professional Development office and are open to educators in CASE community member districts and local school districts. Examples of recent workshops include "Executive Functioning Toolkit: Putting the Pieces Together", "iPad Apps for Early Learner", "Chrome as Assistive Technology", "Boardmaker and Beyond" and "Let's Get Talking: Adventures in AAC".

CASE CETT Team Professional Development

The CASE CETT Team pursue continuing professional development in the area of assistive technology and AAC by attending national conferences, including Closing The Gap and Assistive Technology Industry Association. In addition, they participate in list serves such as QIAT (Quality Indicators for Assistive Technology), and are members of ASHA Special Interest Groups.

CASE Collaborative - CETT Consults (SY 2022-2023)

2022-23	Assistive Technology	AAC
Member Towns	16	16
Non-Member Towns	0	3
TOTAL	16	19



ADDITIONAL SERVICES

CASE is fortunate that, once again this year, we have received a grant from Kate's Voice, a non-profit organization providing **music therapy** services to students with special needs. CASE students enjoy the opportunity to participate in this program while enhancing their social, self-expression, communication, and gross and fine motor skills.

CASE provided **home services** to students. This was a result of arrangements with host districts regarding special education services being provided in the home setting. CASE works closely with member districts and families to ensure such services are provided in the most effective and appropriate manner.



(A Holistic Approach to Education)

Fiscal Year 2023 Audit Report

The CASE Board of Directors commissioned an independent auditors' report for the year ending June 30, 2023 from Marcum LLC. The findings are presented to the Board of Directors at their December 8, 2023 meeting. The full report is included as part of this report via electronic link.

BOARD OF DIRECTORS MEETING – December 8, 2023

AGENDA ITEM: V. B. *Approval of FY23 Financial Audit Report*

 X

Vote Requested

Information Only

Facilitator: *Marcum LLP, Auditors*

Recommended Motion: *Move to accept CASE's Annual Financial Statements Report for the year ending June 30, 2023 as presented.*

INFORMATION:

Representatives from Marcum LLC. will review their findings and answer any questions about CASE's FY23 Financial Audit.

For the reference of the Board, the FY23 Financial Audit is included as a separate document in this packet.

A vote to accept the auditors' findings is requested. By statute, an approved report will then become part of the CASE FY23 Annual Report.

BOARD OF DIRECTORS MEETING – December 8, 2023

AGENDA ITEM: V. C.

Approval of FY23 Cumulative Surplus

 X

Vote Requested

Information Only

Facilitator:

George McCormack, *Finance and HR Director*

Recommended Motion:

Move to approve the cumulative surplus for FY23 of \$599,583.50 as stated in the auditors' report.

INFORMATION:

There is a cumulative surplus of \$599,583.50, which is 29% of the total FY23 General Fund expenditures.

In order to comply with 603 CMR 50.07(9), a vote is required to approve the excess funds above 25% of General Fund expenditures, which total \$599,583.50.

Concord Area Special Education Collaborative						
FY23 Cumulative Surplus Calculation						
6/30/2023						
DESE Cumulative Surplus calculation structure:						
Voted Cumulative Surplus Calculation as of 6/30/22	\$	4,728,111				
Amount of 6/30/22 cumulative surplus returned to member districts		(1,513,150)				
Unexpended FY23 General Funds		881,492	plug - Marcum has to plug this number b/c DESE requires budgeted funds			
Cumulative Surplus as of 6/30/23	A	4,096,453				
FY23 Total General Fund Expenditures		15,515,276				
Less: MTRS on-behalf recorded by Marcum (should not be included per DESE)		(885,312)				
Less: MSERS on-behalf recorded by Marcum (should not be included per DESE)		(642,486)				
		13,987,478				
Cumulative Surplus Percentage		29%	Percentage is greater than 25% threshold set by DESE - see explanation			
	A	= Note: cumulative surplus is actually the unassigned fund balance				
		13,987,478.00	total adjusted FY23 GF expenditures per above			
		25%	threshold set by DESE			
		3,496,869.50	25% of total adjusted FY23 GF expenditures - this is the maximum cum			
		4,096,453.00	actual FY23 cumulative surplus			
	B	(599,583.50)	Difference			
	B	Regulations allow the collaborative to use the surplus money in four ways:				
		1. Contribution to OPEB Trust				
		2. Contribution to Capital Plan				
		3. Member Credits				
		4. Return the money to the member towns				

BOARD OF DIRECTORS MEETING – December 8, 2023

AGENDA ITEM: V. D

*Acton DPW - Fuel Tank Replacement Capital Plan/Impact on CASE
 Transportation Department*

Vote Requested

 X

Information Only

Facilitators:

*Sanchita Banerjee, Executive Director
 George McCormack, Finance and HR Director
 Marty Finnegan, Transportation Manager*

Recommended Motion:

INFORMATION:

CASE's transportation department depends on fuel pumps owned by the town of Acton. The arrangement to use the town's fuel pump has been in place for over 30 years. This has been our sole source of gasoline for the last 30 years and has been extremely beneficial to our transportation and in turn, our members, for several reasons, chief of which is the ability to buy gasoline at wholesale price.

It has recently come to our attention that the town of Acton is considering and finalizing a plan to replace their fuel tanks that serve the municipality. Per information we gathered, there are 4 fuel tanks in question. Two of these tanks are used by the town. One is used by the Acton Boxborough Regional School District and the last one is used by CASE.

We have not participated in any meetings on this topic in a formal manner. On inquiry (dated 12.5.23), the following information on the cost of said replacement was provided to us:

Total Project Cost		Town/School - Cost Breakdown			School - Cost Breakdown	
Construction	\$ 2,447,187	Town	\$ 1,037,829.00	38.9%	ABRSD	\$ 815,729.00
Design	\$ 222,100	ABRSD/CASE	\$ 1,631,458.00	61.1%	CASE	\$ 815,729.00
Total Project Cost	\$ 2,669,287	Total	\$2,669,287.00	100.0%	Total School	\$ 1,631,458.00

The town had an initial plan for CASE to contribute 25% of the cost of this replacement based on us using only 1 pump out of 4. As of 12.5.23, we received information that the town is now planning for CASE to contribute 1/3 of the total renovation cost. The cost to CASE, if CASE carries 1/3 of the total cost, would be \$815,729. This is an estimate and this amount could differ.



Central Office
120 Meriam Road
Concord MA 01742
Tel: 978-318-1534
Fax: 978-371-7858

We would like the Board to be aware of this plan because it has ramifications on CASE's gasoline use. A discussion by the Board is requested on this topic because of the impact it will have on CASE's transportation.

BOARD OF DIRECTORS MEETING – December 8, 2023

AGENDA ITEM: V. E. *FY23 Cumulative Surplus Resolution Proposal*

 X

Vote Requested

Information Only

Facilitators: *Sanchita Banerjee, Executive Director*
George McCormack, Finance and HR Director
Marty Finnegan, Transportation Manager

Recommended Motion: *Move to approve _____ (dollar amount) for the purpose of*

INFORMATION:

FY23 Cumulative Surplus: \$599,583.50 (29%)

There was a surplus in the FY23 Transportation Budget as stated above that needs to be resolved. The authorizing law, Massachusetts General Law c. 40 § 4E, and the accompanying regulations, 603 CMR 50.00, address cumulative surplus and collaborative budgeting practices.

In summary, there are four options for which the surplus can be used:

1. Contribution to OPEB Trust
2. Contribution to Capital Plan
3. Allocation of Member Credits
4. Return the Surplus to the Member Towns

Option 1 - This option is approved by the Board each year where it allocates funds to be transferred to the **OPEB Trust**. This is done at the last Board meeting and funds are assigned from the operating budget.

Option 2 - As set forth in 603 CMR 50.07(10) Educational Collaboratives may establish a capital reserve fund. The purpose is to support costs associated with maintenance and improvement of fixed assets that the Collaborative is unable to accomplish out of the operating budget.

CASE sets forth an option to fund the Acton Fuel Pump Station Renovation by **modifying the capital plan of the existing capital reserve account**.

The previous capital plan was to construct an equitable playground and recreation space. This project was completed and the funds have been exhausted.

The capital reserve account is already established. In order to fund it for another purpose a vote to modify the capital plan must be taken by the school committees. A 2/3 vote is required to amend the capital plan.*

PROJECT	TIMELINE	SURPLUS AMOUNT
Acton Fuel Pump Station Renovation	<i>Estimated</i> Completion Date: TBD	\$599,583.50

603 CMR 50.07 (10) d. In the event that the purpose for which the capital reserve was created requires modification, the collaborative board of directors shall revise its capital plan and provide notice to all member districts. If the member district does not vote to disapprove the revised capital plan within a 45 day period, that member shall be deemed to have approved the revised capital plan. **Two-thirds (2/3) approval of the member districts is required to revise the capital plan.*

Option 3 - If the Board decides on the third option, the surplus distribution to districts in the form of **member credits** will be applied to the second FY24 transportation assessments. Allocation of such credits will be based on ridership based on table below.

Option 4 - If the Board decides on the fourth option, the surplus distribution in the form of **returning the money to districts** will be done after this Board meeting (FY24) and will be based on ridership as below.

Member	FY23%	FY23 Gross Assessmt	Surplus	FY24 Gross Assessment	1st payment	Surplus	2nd payment
ABRSD	32.00%	\$2,003,624.72	\$ 191,866.72	\$ 1,787,687.14	\$ 893,843.57	\$ 191,866.72	\$ 701,976.85
BEDFORD	8.36%	\$523,446.96	\$ 50,125.18	\$ 491,227.40	\$ 245,613.70	\$ 50,125.18	\$ 195,488.52
CARLISLE	2.39%	\$149,645.72	\$ 14,330.05	\$ 155,813.05	\$ 77,906.53	\$ 14,330.05	\$ 63,576.48
CONCORD	12.57%	\$787,048.84	\$ 75,367.65	\$ 710,674.03	\$ 355,337.01	\$ 75,367.65	\$ 279,969.37
CCRS	9.86%	\$617,366.87	\$ 59,118.93	\$ 600,058.66	\$ 300,029.33	\$ 59,118.93	\$ 240,910.40
HARVARD	4.91%	\$307,431.17	\$ 29,439.55	\$ 244,424.29	\$ 122,212.14	\$ 29,439.55	\$ 92,772.59
LINCOLN	2.01%	\$125,852.68	\$ 12,051.63	\$ 121,914.79	\$ 60,957.40	\$ 12,051.63	\$ 48,905.77
LINCOLN/HANSCOM	6.86%	\$429,527.05	\$ 41,131.43	\$ 545,940.38	\$ 272,970.19	\$ 41,131.43	\$ 231,838.76
LITTLETON	10.06%	\$629,889.52	\$ 60,318.10	\$ 673,207.53	\$ 336,603.77	\$ 60,318.10	\$ 276,285.67
SUDBURY	10.98%	\$687,493.73	\$ 65,834.27	\$ 616,115.73	\$ 308,057.86	\$ 65,834.27	\$ 242,223.60
		\$6,261,327.25	\$ 599,583.50	\$ 5,947,063.00	\$ 2,973,531.50	\$ 599,583.50	\$ 2,373,948.00

BOARD OF DIRECTORS MEETING – December 8, 2023

AGENDA ITEM: V. F.

*Potential Change of Health Insurance Carrier/
Potential Withdrawal from MNHG*

 X

Vote Requested

Information Only

Facilitators:

*Sanchita Banerjee, Executive Director
George McCormack, Director of Finance and Operations*

INFORMATION:

CURRENT STATUS OF MNHG AS OF DECEMBER 8, 2023

Minuteman Nashoba Health Group (MNHG) is a collective purchasing group that was created in 1990. CASE has been fortunate to belong to this group, the only collaborative to do so. However, it is a volatile time and MNHG has announced that the future of this collective group is at risk. The trust fund balance is materially below target.

In the last three years, five members have withdrawn from the group. There are twelve voting members in the MNHG right now. This year, so far three groups have announced their intent to leave. In addition, a fourth and fifth group conveyed in the meeting in November that they also intend to leave at the end of the year. This comprises 48% of the group. All five entities are leaving due to the high insurance rate increase this year of 13.75%. With five members potentially leaving, MNHG is not sustainable because the burden of the costs would be unmanageable for small entities like CASE. In addition to the above scenario, remaining units are actively seeking bids in the market. The risk to remain, as perceived by key unit decision-makers, is seemingly elevated.

Since November 6, we have conducted a survey of health insurance information pertaining to Collaboratives in MA and also of our member districts. CASE has engaged the services of a Health Insurance Specialist. We are soliciting quotes from MIIA, Harvard Pilgrim, and Tufts. We have also had communication with our Professional Teachers Association who are keen on CASE joining GIC. The executive director of GIC has reached out to extend the application deadline from December 1 to January 1, should CASE join GIC.

At the meeting in November, the MNHG Board extended the deadline to submit the letter of intent from December 1 to December 12. All entities have been encouraged to submit their intent notice by this deadline. There is a Board meeting on December 14 to review the intent notices and determine next steps.

The formal confirmation of unit exit is required by February 15, 2024.



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The Board is requested to discuss this matter and vote on this topic so CASE can inform MNHG of its decision by December 12. This will also allow CASE to review and consider next steps in this process of changing its health insurance carrier.

The letter of intent to depart MNHG is attached to this memo.

December 12, 2023

TO: Karen Quinlan
Client Manager Associate
Gallagher Benefit Systems
446 Main st. Suite 1801
Worcester, MA 01608

CC: Joe Anderson
Area Vice President
Gallagher Benefit Systems
446 Main st. Suite 1801
Worcester, MA 01608

Dear Karen and Joe,

This memo is to inform Gallagher Benefit Systems that the Concord Area Special Education Collaborative, (CASE) Collaborative, intends to depart the Minuteman Nashoba Health Group (MNHG) at the end of 2024 fiscal year; June 30th 2024.

CASE Collaborative retains the right to rescind this memo and remain a member of the joint purchasing group. You will be notified of any changes before February 15th, 2024.

Should CASE Collaborative depart the MNHG by choice or necessity, it has been a pleasure working with you both.

Sincerely,



Sanchita Banerjee
Executive Director
CASE Collaborative
t. 978-318-1534
e. sbanerjee@casecollaborative.org

BOARD OF DIRECTORS MEETING – September 8, 2023

AGENDA ITEM: V.G. *Interview of Director of Finance and Operations*

_____ *Vote Requested*

 X *Discussion Only*

Facilitator: *Sanchita Banerjee, Executive Director*

Recommended Motion:

Treasurer Appointment:

CASE's Finance Director, George McCormack, is moving on to another position and will not be with CASE after December 8, 2023. We thank George for his service to CASE for the past couple of years.

CASE is recommending Joseph Adams as a finalist for the finance and operation position. CASE administrators have reviewed his credentials, interviewed him, and spoken to his references.

The Board is requested to interview Joseph. Attached to this memo is Joseph's resume for the Board's consideration.

Joseph S. Adams

EDUCATION

BOSTON COLLEGE

Bachelor of Science- Management

Sept. '04 – May '08
Chestnut Hill, MA

- Double major in Finance and Information Systems
- GPA 3.5/4.0
- *Collegiate Varsity Athlete*, Division I NCAA Ice Hockey, 2008 National Championship

PROFESSIONAL EXPERIENCE

Academy of Pacific Rim

Interim Director of Finance

March 2023 – Present
Hyde Park, MA

- Supervise and support district-wide Coordinators along with contracted service providers, and work scheduling/PTO.
- Review & approve purchase requests and verifying proper procurement practices are in place across all school locations
- Support long-term planning; strategy development as it relates to budgeting and financial modeling
- Track, monitor, and analyze revenue, expenses, assets, and cash flow against approved budgets to forecast financial results and recommend necessary actions to adhere to state surplus regulations

LABBB Collaborative

Director of Finance & Operations

2019-2022
Burlington, MA

- Head of multi-departmental oversight for five school districts, managing 225 employees serving 300 special needs students across fourteen locations
- Directly supervise Central Office staff, including HR, Finance, Procurement, IT, and Transportation teams
- Coordinate administrative support, work scheduling, and performance goals for district-wide staff and service providers
- Ensure adherence to procurement practices, approve purchase requests, and manage district-wide vendor relationships
- Maintain regulatory compliance with local, state, and federal standards (GAAP, GASB) and oversee annual financial audits
- Collaborate with stakeholders on budget development, strategy, and long-term planning
- Present quarterly and annual financial statements to the Board of Directors, tracking and analyzing financial metrics against approved budgets

Accounting Manager

2018-2019

- Built out financial operations for entire organization while coordinating separation from previously outsourced financial service contractor
- Responsible for monthly accounting entries, reconciliations and financial forecast/budget updates
- Created financial forecast model for entire organization segmented by school programs
- Developed and updated payroll allocation procedures and database for inclusion in forecast model and adherence to controls and policies
- Built tuition invoicing system and procedures to streamline maintenance of student enrollment records, projected revenues, and monthly student tuition billings

KIPP MASSACHUSETTS CHARTER SCHOOL

Manager of Financial Systems

2017-2018
Lynn, MA

- Responsible for budgeting/forecasting for five charter schools in Lynn/Boston totaling \$35+MM revenue
- Redeveloped forecast financial models to streamline workflows and highlight relevant information for school leaders/decision makers
- Processed payroll and related accounting entries to ensure proper expense allocations across schools
- Facilitated annual audit while stepping in as interim manager of the regional finance office (3 members)
- Supported regional leadership (Executive Director, COO and Sr. Director of Finance) with region-wide financial updates and any ad-hoc analysis projects

Financial Analyst

2016 – 2017

- Utilized online system to process and import accounting entries on all AP invoices (\$40K daily trans avg)
- Assisted in monthly accounting entries, including reconciliations and financial forecast/budget updates

SANDLER O'NEILL + PARTNERS, L.P.

2010 – 2014

Associate - Equity Research

New York, NY

- Supported a Senior Analyst performing fundamental equity research on nineteen southeastern banks
- Created and maintained valuation models and earnings forecasts
- Published timely research reports to be distributed to buy-side institutional client base
- Presented investment opinions to Senior Analyst, internal salespeople, and buy-side clients
- Gathered, manipulated, and interpreted large amounts of financial data in order to identify company specific and industry trends

US PEACE CORPS

May '08 – July '10

Volunteer - Community Economic Development

Kwamalasamutu, Suriname

- Assisted Conservation International in the development of a rainforest tourist lodge in South America
- Collaborated with IICA to teach better agricultural practices promoting vegetable and cassava production
- Coordinated projects with centralized distributors to emphasize rural economic development

WACHOVIA SECURITIES

June '07 – Aug '07

Summer Analyst - Real Estate Capital Markets

New York, NY

- Member of loan origination deal team
- Assessed 100MM+ leveraged loans with respect to cash flows, debt service and loan-to-value
- Performed loan due diligence to facilitate the prospective closing date

DEUTSCHE BANK SECURITIES

June '06 – Sept. '06

Intern - Institutional Sales and Trading

Boston, MA

- Designed and built a stock database from fund portfolios to assist sales force's client contact coverage list
- Created annual sales review screening system to evaluate deal and cross-selling performance
- Summarized Deutsche Bank daily equity research for institutional sales team
- Pitched a stock idea to senior members of the sales team as a final summer presentation
- Attended secondary, IPO, and Deutsche Bank analyst road show meetings

GREAT PLACES REALTY

June '06 – Sept. '07

Sales and Rental Agent

Chestnut Hill, MA

- Through targeted internet advertising and networking, sold rental apartments and houses
- Facilitated closing due diligence with client and respective owner
- Balanced a heavy workload while attending college and playing Division I Ice Hockey

ADDITIONAL INFORMATION

- Industry Qualifications: Series 7, 63, 86, and 87
- Languages: fluent in Sranan Tongo (Suriname's *lingua franca*) and conversational in Trio
- Sumner Award- academic and athletic achievement, Phillips Academy Andover
- Proficient in Excel, PowerPoint, Windows, Mac OS X and basic programming
- Candidate for Level II CFA Examination, June 2013

References Available Upon Request