



# Abby Kelley Foster Charter Public School

10 New Bond Street Worcester, MA 01606

Phone: (508) 854-8400 Fax: (508) 854-8484

www.akfcs.org

## Board of Trustees Meeting Agenda-DIGITAL MEETING

Wednesday, March 1, 2023, 6:30 p.m.

<https://akfcs-org.zoom.us/j/99859185086?pwd=Q3I0d0JOOVRqM1Y4bllEblF3dHNhZz09>

**Webinar ID:** 998 5918 5086 **Passcode:** 367698

**By phone:** +16469313860 **Webinar ID:** 998 5918 5086

- I. Call to Order- Mr. Patrick Royce, Chair
- II. Attendance Recorded
- III. Faithfulness to the Charter
  - a. Reading of the AKF Mission: *"The Mission of the Abby Kelley Foster Charter Public School is to assist parents in their role as primary educators of their children by providing a classical liberal arts education grounded in the great works of Western Civilization and aimed at academic excellence, musical competence, and character formation."*
  - b. Public Comments/Open Forum
  - c. Old Business
- IV. Review of the meeting minutes from January 25, 2023
  - a. **Motion:** To approve the January 25, 2023, meeting minutes
- V. Executive Director Report- Ms. Heidi Paluk
- VI. Committee Updates
  - a. Facilities & Finance Committee- Mr. Adam Beaudry
  - b. Education Committee- Ms. Amy Vernon
    1. **Motion:** To approve the AKFCS Wellness Policy as Presented
- VII. Strategic Plan Update
- VIII. Timely Topics as Identified by the Chair and/or ED
  - a. Ongoing Investigation
- IX. Upcoming Board/Committee Meeting(s):
  1. Board of Trustees
    - a. Wednesday, March 29, 2023
  2. Governance Committee
    - a. Friday, March 3, 2023
  3. Education Committee
    - a. Friday, March 10, 2023
  4. Facilities & Finance Committee
    - a. Friday, March 17, 2023
- X. Adjournment

*Abby Kelley Foster Charter Public School does not discriminate on the basis of race, color, sex, gender identity, religion, national origin, sexual orientation, disability, or homelessness and all students have equal access to the general education program and the full range of any occupational/vocational education programs offered by the district.*



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### Board of Trustees Meeting Minutes- DRAFT

Wednesday, January 25, 2023, 6:30 p.m.

<https://akfcs-org.zoom.us/j/98954985296?pwd=aGhmdzk3eFh2MnlhOTZlU0FBcEp6QT09>

**Webinar ID:** 989 5498 5296 **Passcode:** 540128

**By phone:** 16469313860 **Webinar ID:** 989 5498 5296

The meeting was called to order by Mr. Patrick Royce, Chair, at 6:30 p.m. The attendance was recorded and is attached.

Mr. Royce read the Abby Kelley Mission Statement and noted no public comments or old business. Mr. Royce requested a motion to accept the December 14, 2022, meeting minutes. Ms. Blue made the Motion, and Ms. Zagabe-Ndiku seconded it. Mr. Royce performed a roll call, and the minutes were approved unanimously.

### **Executive Director Report**

Middle and high school basketball teams are  $\frac{3}{4}$  of the way through the season, and the Cheerleading team is getting ready to start their competition. The learning center in the middle school has opened Central Perk Cafe, teaching them life skills such as shopping, budgeting, and cooking. Students are responsible for sharing order forms with staff, collecting monies, and delivering the food. The strings department has been accepted again into the MICA competition, which will be held in April.

Multiple tests are taking place, with high school students taking their midterms last week and access testing also taking place. DEI continues to meet regularly, and the district-wide survey results are being tallied. A call for new members was made, with nine applications coming in. Staff was treated to an Amazon gift card and Abby Kelley logo hat for the Christmas holidays, and lunch is still being provided to staff. Finance office restructuring is continuing to move forward according to plan, and efforts are being made to stay on track. There are a few vacancies in the district, as seen across the country, and the Director of Curriculum position has been posted.

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Proposals are being sought for consulting help with WBDC and are due next week. Community leaders have been meeting with Ms. Paluk to speak on the role of Abby Kelley in the community. A bid will be going out for the HVAC systems in the elementary school as all the units are currently cabinet units and not energy efficient. Charter Renewal will be voted on at the end of February, with the draft showing that Abby Kelley is meeting the expectations. Enrollment lottery and applications are open through February 27, 2023. An in-person open house was conducted, with about thirty-five (35) families attending in person Thursday morning and twenty-five through thirty (25-30) families online Thursday night. The lottery is on March 8, 2023, and an accepted students' day is being planned so that future students can see what a day is like.

The foundation hosted an alum event on January 5, 2023, where alums came to enjoy a fun time at the School Yahd in Worcester. The President and Dean of Worcester State College will be visiting the high school to conduct a tour of the campus. Mr. Royce inquired about the data project update. Ms. Paluk noted that they are currently working with a consultant and continuing to work on data blocks and ways to celebrate the success that we see.

### **Committee Updates**

### **Facilities & Finance**

Ms. Erica Brown, from the Massachusetts Charter School Association, presented the steps taken when building a budget and the suggested way of doing it at the January meeting. Ms. Brown spoke on how tuition is calculated and provided a spreadsheet that could be used to determine the foundation rate. Suggestions and tips were also provided on how to budget for the school with that information. Mr. Ryan Kitteridge, from Clearpath Financials, was also a guest speaker and spoke on investment options and the benefits and risks that come with them. A few proposals were provided, with Mr. Kitteridge agreeing to create a document showing the different options available to Abby Kelley.

Financials were discussed, noting that tuition is above budget by about \$337,000 due to a 10% reduction from DESE. COVID funding is still under budget due to the MTRS monies taken at once last year. The Nutrition department is currently \$17,775 over budget, with revenue being \$90,443 over budget due to higher student participation. Salaries are currently \$773,656 under budget because of open positions within the district.



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At the end of December, the balance shows \$1.8 million positively. The FY'23 Debt Service Coverage Ratio is 1.83:1, compared to a required ratio of 1.15:1. A special thank you was given to Ms. Carpino for her hard work.

### **Governance Committee**

The public comments on the Board policy were reviewed, and changes were suggested. The preference section would be removed from the current policy. It was noted that the time frame of five days would be removed and replaced with verbiage that reflects the open meeting law and when the agenda should be posted to the city, which is 48 hours before the scheduled meeting. It was also noted that with current technology, comments could be submitted electronically to the administrative assistant instead of by paper, and six copies would not be necessary. Tools and training for new and current Board members were discussed, along with recruitment and onboarding of Board members. The matrix sent out to Board members would be used as a tool to determine the areas of needs such as real estate and communications, and marketing and recruiting with those places of need in mind. Mr. Royce asked for a motion to approve the changes to the comment to the board policy, with Ms. Zagabe-Ndiku making the motion and Ms. Vernon seconding. Board members voted unanimously to approve the changes.

Mr. Noah Ligeti, an attorney practicing law since 2015, has been presented as a new member of the Board of Trustees. It was noted that this would be a beneficial skill set on the Board and in the district. Mr. Royce motioned to approve Mr. Noah Ligeti as a new Board member with a three-year term. Ms. Blue made the motion, and Ms. Zagabe-Ndiku seconded the motion. Board members voted unanimously to approve Mr. Ligeti as a new Board member.

### **Strategic Plan Update**

Ms. Melanie Rivera from Breaker28 will be onsite for two days, February 9, 2023, & February 10, 2023, to conduct focus groups with staff, students, community, and families. These meetings will be held on zoom and in person to accommodate families and staff. Each meeting would have 6-8 people, and names would be selected.

Mr. Royce called for a motion to adjourn the meeting at 7:20 p.m. Ms. Blue made the motion to adjourn, and Ms. Zagabe-Ndiku seconded the motion. Board members voted unanimously to adjourn the meeting.





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## Facilities and Finance Committee Meeting Agenda-DIGITAL MEETING

Friday, February 17, 2023, 8:00 a.m.

<https://akfcs-org.zoom.us/j/92769937958?pwd=OFJSaHNTZnlhMzNaY3NkYnRIL3NTUT09>

**Meeting ID:** 927 6993 7958 **Passcode:** 134789

**By phone:** +1 929 205 6099 **Meeting ID:** 927 6993 7958

- I. Call to Order- Mr. Adam Beaudry
- II. Introductions/Attendance Recorded
- III. Review of the January 20, 2023, Meeting Minutes
  - a. **Motion:** To accept the January 20, 2023, Meeting Minutes
- IV. CD/Investment Update- Ms. Alisha Carpino
- V. Long-term Facilities Planning Proposal- Ms. Heidi Paluk
- VI. WBDC/Abby Kelley Proposal Update- Ms. Heidi Paluk
- VII. Facilities Report- Mr. Andrew Cruickshank
- VIII. IT Report- Mr. Gabriel Beltran
- IX. Timely Topics as Identified by the Chair and/or ED
- X. Upcoming Facilities & Finance Committee Meeting(s):
  - a. Friday, March 17, 2023
  - b. Friday, April 14, 2023
  - c. Thursday, April 20, 2023- Budget Meeting
- XI. Adjournment



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### Facilities and Finance Committee Meeting Minutes -DRAFT

Friday, January 20, 2023, 8:00 a.m.

<https://akfcs-org.zoom.us/j/97134289470?pwd=a3BjWUxnR1dLQXhFYlo2cVYyVTNIUT09>

**Meeting ID:** 971 3428 9470 **Passcode:** 472863

**By phone:** 13052241968 **Meeting ID:** 971 3428 9470

The meeting was called to order by Ms. Zagabe-Ndiku. The attendance was recorded and is attached. Ms. Zagabe-Ndiku asked the Committee to review the Meeting Minutes from the December 16, 2022 meeting. One minor correction was noted. Upon its review, Ms. Zagabe-Ndiku asked for a motion to approve the minutes from the December 16, 2022, Facilities and Finance Meeting with the edit. Mr. Royce made the motion, and Mr. Beaudry seconded it. The committee unanimously approved the minutes.

#### **Guest Speaker**

#### **Ms. Erica Brown, MPCSA**

Ms. Erica Brown from the MPCSA provided a presentation on building a school budget and the suggested ways to build it. Ms. Brown spoke on how tuition is calculated and provided a spreadsheet that could be used to determine the foundation rate. Suggestions and tips were also provided on how to budget for the school with that information. Ms. Brown explained that a calculation shows the amount Worcester county must spend on public education. Depending on where a student comes from, it would determine if an above foundation rate per pupil would apply, but this does not apply to Worcester as they are not spending as much on education.

Ms. Brown explained that budgets are created based on understanding the financial risks involved. Enrollment, tied to budget creation, is experiencing a statewide challenge that should be factored into the budget. Ms. Brown spoke on the need to create a nest egg that could be used for emergencies and fill gaps for that year. Ms. Brown also spoke on the need to ensure that schools are not underspending on education services to conserve and instead invest monies into academic recovery. Carrying a large surplus could potentially result in having to return the funds to the City of Worcester.



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Mr. Royce inquired about additional training being provided by MPCSA, and it was noted that other trainings were being created and information would be sent out. Committee members thanked Ms. Brown for her time.

### **Mr. Ryan Kittredge**

#### **Clearpath Financial Partners**

Mr. Kittredge provided investment allocation information for the proposed 5.5 million dollars from Abby Kelley. Mr. Kittredge provided a general explanation of the various allocations, penalties, allocations and how they may benefit the school. Money markets, CDs, and treasury-backed monies were discussed, with Mr. Kittredge encouraging committee members to look at all options for the investment. It was noted that there might be better options than placing all funds in a one-year CD as other factors, such as inflation, affect those monies.

Mr. Kittredge explained that he would create an executive summary of each of the guaranteed options, money markets, CDs, and treasuries, along with his recommendations. This summary will show the diversification options, the penalties, and the timeline information and will be sent out on Monday.

### **Financial Report**

Ms. Carpino provided the financial report, noting that the actual tuition and transportation payments are \$337,779 above the budgeted amount. Projected tuition has been decreased by \$86,792 due to a 10% decrease in low-income and a reduced seat count of four (4). COVID funding is still under budget due to the MTRS monies taken at once last year. The Nutrition department is currently \$17,775 over budget, with revenue being \$90,443 over budget due to higher student participation. Salaries are currently \$773,656 under budget because of open positions within the district.

No change was made from Blue Cross Blue Shield as the renewal was completed at a 0% increase. Expenses for benefits and other fixed charges are currently under the budgeted amount of \$188,801 because of this no-cost renewal. It was noted that salaries for instructional teachers are under budget by \$300,000 due to



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teachers that are out on leave and having their wages paid for by a third-party company. At the end of December, the balance shows \$1.8 million positively. The FY'23 Debt Service Coverage Ratio is 1.83:1, compared to a required ratio of 1.15:1.

### **Facilities Update**

Mr. Cruickshank provided a brief update, noting the continued work on the middle and high school roofs by Centimark. The middle school Stucco portion of the work has been completed, helping to eliminate several issues. The CMMS system is slowly being rolled out to maintenance members and will be shared with the district soon. EDS Mechanical & McIntyre Electrical has completed the Elementary school cafeteria HVAC installation. Camera installations in the middle are still taking place, and a vendor is being worked with to install the outer cameras.

A meeting was held with VIP landscaping regarding the potholes in the high school, and a proposal was submitted for that work. The gym floor logo in the high school is still being worked on, and discussions are taking place for refinishing the activity center floors.

Ms. Zagabe called for a motion to adjourn the meeting at 9:25 a.m. Ms. Blue made the motion, and Mr. Beaudry seconded it. Roll call was taken, and the committee voted unanimously to end the meeting.



**C/O Bob Baldwin  
375 Acorn Park Drive, #2307  
Belmont, MA 02478**

February 10, 2023

Heidi M. Paluk  
Executive Director  
Abby Kelley Foster Charter Public School  
10 New Bond Street  
Worcester, MA 01606

Dear Heidi:

Following up on our meeting and discussions to date, we are pleased to present a proposal to provide continued real estate advisory services related to the future plans for the Abby Kelley Foster (AKF) school campus. The scope of services envisioned in this proposal is limited to the initial strategizing, planning, analysis, and feasibility. Once a plan has been established, we can revisit the role of QPD going forward during the plan execution phase.

Following are proposed terms:

**Client:** Abby Kelley Foster Charter Public School,  
10 New Bond Street, Worcester, MA 01606  
Heidi Paluk, Executive Director  
Patrick Royce, Board Treasurer

**Consultant:** QPD LLC, 375 Acorn Park Drive, #2307, Belmont, MA 02478

**Objective:** Client's objective is to enhance school operations, financial stability and educational opportunities at its Worcester campus by potentially implementing improvements to its currently owned buildings, constructing new facilities within the campus, acquiring or leasing additional property, and/or partnering with neighboring property owners and developers.

This proposal addresses only the initial stage of the process, which comprises a facilities master plan development. At the completion of the proposed engagement, AKF should be prepared to begin fully executing upon the first

phases of the plan.

**Scope of  
Services:**

QPD will provide strategic advisory services that guide AKF through the process of defining and prioritizing its needs, identifying opportunities and constraints, identifying potential solutions for each need, evaluating conceptual feasibility of solutions, assessing financial capacity and outlining a prioritized development process. QPD will meet with AKF regularly, visit the site numerous times, and make a PowerPoint presentation to the Finance/Facilities Committee and the Board (in May or June).

- 1. Planning:** QPD will coordinate and advise upon the planning effort for the campus, which will require significant participation from AKF. QPD advice will be primarily related to execution logistics, future opportunities, risks, financial feasibility, permitting feasibility, and prioritization.
- 2. Physical Property:** QPD will manage consultants to perform limited property due diligence and existing conditions surveys for buildings and grounds as prioritized for improvement or re-use.
- 3. Process Timeline:** QPD will create a conceptual development schedule in Gantt format which can be used to inform the development process and guide decision making.
- 4. Financial:** In order to assess financial feasibility and implications of various facilities plan options, QPD will evaluate AKF's long-term operating pro forma to assess financial capacity to execute on the facilities plan, identifying equity gaps in preliminary total project uses to guide and prioritize implementation.

**Follow Up:**

Following completion of this engagement, QPD will be available to assist with or manage the implementation of the project provided that an Owner's Project Manager is engaged to directly perform the majority of the tasks.

**Team:**

Bob Baldwin and Lindsay Richard

**Term:**

Term of engagement is approximately four months, commencing by March 1, 2023 and ending by June 30, 2023. Depending on the pace of the work in tandem with AKF's school strategic plan work, QPD will target the May or June board meeting for final presentation.

**Compensation:**

Fixed fee of \$18,000 payable in four even equal monthly payments of \$4,500 per month.

Thank you for the opportunity to make this proposal. We are happy to discuss at your convenience.

Sincerely,

Robert H. Baldwin, Jr.  
Managing Principal

Lindsay Richard  
Principal

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**ACCEPTED BY:**

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

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



January 30, 2023

Ms. Heidi Paluk, Executive Director  
Abby Kelley Foster Charter Public School  
10 New Bond Street  
Worcester, MA 01606

**RE: Response to Request for Proposal  
Engineering and Environmental Assistance  
Proposed Greenwood Neighborhood Redevelopment**

Dear Ms. Paluk:

OHI Engineering, Inc. (OHI) is pleased to provide this response to the request for proposal issued by the Abby Kelley Foster Charter Public School (AKFCPS) relative to assisting AKFCPS with the potential impacts associated with the proposed redevelopment of the former Saint-Gobain (SG) properties by New Garden Park, Inc./Worcester Business Development Corporation (NGP/WBDC).

**PROJECT UNDERSTANDING**

Approximately 51-acres of the former SG Worcester campus, including 45 buildings of which 40 are currently vacant, was recently conveyed to NGP/WBDC. As shown on the attached Figure 1, the conveyed properties essentially surround the AKFCPS properties. NGP/WBDC has indicated that it intends to redevelop Worcester's Greenwood neighborhood, which includes the former SG campus. According to NGP/WBDC, the project will include building demolition, infrastructure upgrades, and reintroduction of public roadways.

The AKFCPS properties were also formerly part of the SG Worcester campus and were acquired by AKFCPS in 2008 (High School) and 2010. There are significant utility and access interconnections between the AKFCPS properties and the former SG campus that may not be fully understood. OHI has been addressing environmental, civil engineering, geotechnical, and safety issues related to the AKFCPS properties and their former uses since 2018.

OHI has had extensive involvement in addressing these environmental issues, and has significant institutional knowledge of the AKFCPS properties, and the surrounding lands now or formerly owned by SG as well as SG (formerly Norton Abrasives) operations and infrastructure. OHI has institutional knowledge of local civil engineering, geotechnical and environmental concerns and the historical uses of the surrounding area. OHI's environmental and engineering expertise provides high-quality services to ensure that AKFCPS' interests and concerns with the potential NGP/WBDC redevelopment are professionally expressed. OHI also has experience meeting with AKFCPS Stakeholders and working in close cooperation with AKFCPS legal counsel.

We understand that the NGP/WBDC will prepare a Master Plan for redevelopment of the SG campus. The Master Plan is anticipated to only provide a broad overview of the types of uses, parking, access, and stormwater. NGP/WBDC provided summary reports to the Massachusetts Department of Environmental Protection (MassDEP) summarizing much of their environmental investigations and OHI has begun reviewing these reports as they relate to ongoing environmental investigations and compliance work for the High School. OHI anticipates NGP/WBDC will lay out pad sites or parcels in their Master Plan that will later be offered to private entities for development/re-development. Each of these will require additional review as the details of their use and construction will not be available until developed.

## **PROJECT TEAM**

James R. Borrebach, P.E., L.S.P. will serve as the Principal in Charge. Mr. Borrebach has 40 years of professional consulting experience in engineering and environmental sciences. He is a registered Professional Engineer and Licensed Site Professional in Massachusetts and has direct experience with the AKFCPS campus.

Brian G. Snow, P.G., L.S.P., L.E.P. will serve as manager of environmental aspects of the work. Mr. Snow has 30 years of professional consulting experience in environmental sciences. He has direct experience with the AKFCPS campus while serving as the Licensed Site Professional (LSP) of Record for the work being conducted by AKFCPS relative to the Massachusetts Contingency Plan (MCP).

Scott Rolfe will serve as manager of engineering aspects of the work. Mr. Rolfe has 50 years of experience in engineering and survey, site planning, and permitting services. Mr. Rolfe has direct experience on the AKFCPS campus.

Mr. K.E. Hazarvartian, PhD, P.E. will provide traffic and transportation review services. Mr. Hazarvartian has over 30 years of traffic/transportation related consulting experience.

OccuHealth, Inc. will provide construction safety review services. OccuHealth has provided services on the AKFCPS campus and is aware of its setting and implications associated with demolition, air quality, dust, and general safety concerns. OccuHealth worked with OHI for years resolving several indoor air quality concerns at each of the AKFCPS buildings. Mr. David Fisher of Fisher Design Group will provide planning and landscape architecture review services.

OHI has worked with all of our team members on multiple projects and is well familiar with their specific qualifications and capabilities. Additional information regarding the qualifications of team members is attached.

## **SUGGESTED SERVICES**

### ***Task 1 – Prepare Existing Conditions Plan***

In an effort to evaluate potential impacts of redevelopment on the AKFCPS properties, OHI recommends that an Existing Conditions Plan be prepared. The plan should show building locations, topography, above ground and underground utilities, utility easements, etc. OHI intends to utilize R.E. Cameron & Associates, Inc. to prepare the overall plan.

The purpose of preparing an existing conditions (EC) plan, representative of the “current” site conditions, is to provide team members with an opportunity of being intimately knowledgeable of virtually all aspects of the site relative to dimension, area, grade, site distance, utility proximity, watershed analysis, to name a few.

Essentially, the EC plan lets you experience site criteria, without physically being there. Plan content is a necessity for all team members to analyse any potential impact of future adjacent development, whether it be noise, dust, stormwater, vibration or interruption of utilities and operation. Having the ability to establish direct comparison relative to utility infrastructure alone is reasonable justification for an EC plan. A rebuttal to any proposed work or procedure will likely require plan data to bolster the point.

The benefits of having a current and accurate EC plan also extends to future site modifications, permitting and maintenance. Building and/or site modifications frequently require plan submission to the municipality to show compliance with current zoning regulations, building code and environmental concerns. Accurate dimensional estimates can also be compiled for purposes of providing accurate area calculations for items such as paving, snow removal or utility line maintenance.

The EC plan will also be useful in assisting AKFCPS’ legal team in establishing/correcting any easements or access plans that may later become necessary. Rubin and Rudman, LLP, (R&R) had previously provided a review of utility easements and utility connection permissions. Utility connections have been and remain a concern for AKFCPS, which is elevated by the transfer of ownership to a new entity NGP/WBDC. SG and NGP/WBDC have significantly different legal liabilities, which OHI through its work with R&R understand.

### ***Task 2 – Master Plan Engineering Review and Assistance***

Upon receipt of Masterplan submissions from the NGP/WBDC, OHI will assess and report on any potential engineering related impacts to a specific AKFCPS facility (or combination thereof). Potential impingements may include short/long term access restrictions (due to demolition and excavation), utility shutoff/upgrades, easement negotiation, roadway and walk repair/upgrade, etc. OHI will utilize its considerable experience working in the Site area to draw attention to site-specific concerns. OHI will also analyze and report as to long term phased work, seasonal related construction ramifications and posture of temporary and final conditions. Opinions and recommendations will be forwarded to AKFCPS upon completion. Information acquired with the performance of this task will be shared and coordinated with all other team members.

### ***Task 3 – Master Plan Traffic and Transportation Review and Assistance***

Upon receipt of Masterplan submissions from the NGP/WBDC, OHI's Traffic Engineer (TE) will review studies and designs related to transportation-impact, access and parking. The TE will report on any potential traffic related impacts to an existing time/flow pattern associated with an AKFCPS facility (or combination thereof). These reviews could involve Site visits, assessment of current conditions at various time intervals, identification of likely impact relative to time location, intensity and potential future impacts. Opinions and recommendations will be forwarded to AKFCPS upon completion. Information acquired with the performance of this task will be shared and coordinated with all other team members in an effort to assure validity to all aspects of the requested Master Plan Review. As needed, OHI will also utilize the TE to review and consult on individual pad site/parcel reconstructions as they occur. Construction activities and normal facility operations are likely to present specifically different concerns, especially as they relate to AKFCPS bus/drop off/pick up windows.

### ***Task 4 – Master Plan Environmental Review and Assistance***

OHI will review the Master Plan with specific attention to environmental concerns. OHI notes that due to the size and scope of the project that the Master Plan covers, OHI expects that individual lots that are later developed will include plans, data, and challenges that will require further review and assistance, beyond this task. Environmental issues are present in multiple categories, including Massachusetts Contingency Plan (MCP) (soil, groundwater, vapor intrusion concerns), Wetland and waterways (Weasel Brook, Floodplains), Massachusetts Environmental Policy Act (MEPA), Building conditions (asbestos, lead, PCBs) and related demolition/disposals, water discharges and airborne dust, vapor, etc, during remediation, demolition, construction periods. Several of these tasks are expected to interact/impact engineering and traffic tasks. Many on-going AKFCPS issues including flooding from Weasel Brook and settling related to peat and poorly compacted fill may also be affected by NGP/WBDC re-development.

The property acquired by the NGP/WBDC was characterized by a series of subsurface investigations prior to 2023, including soil and groundwater sampling. Much this work was included in the Immediate Response Action Plan for Release Tracking Number (RTN) 2-22147 for 1 New Bond Street, Building 417, by BETA, Group, Inc. (BETA) in January 2023. This report is currently being reviewed by OHI as part of the AKFCPS High School property investigations and reporting for the High School and OHI will have completed some of this work as part of other ongoing work for AKFCPS.

MCP concerns will include subsurface investigations and MCP reports for NGP/WBDC property and surrounding properties. As OHI has completed investigations at all of the AKFCPS properties and reviewed most of the reports for surrounding properties, OHI possesses significant institutional knowledge of the history of environmental concerns in the Site vicinity.

OHI will review the relevant sections of the Master Plan and provide a review letter summarizing specific concerns. As noted, the Master Plan tends to be more of a summary document that touches briefly on many items. The Master Plan does not specify the exact parcel use, environmental conditions, remediation plan, demolition/reconstruction plan,

construction plan or permitting plan. These details are likely to include the majority of information necessary to determine the extent to which each parcel development may/may not impact AKFCPS. OHI also expects that as the parcels are demolished and redeveloped, new contamination issues are likely to materialize.

### ***Task 5 – Meetings & Coordination***

OHI will meet and coordinate with the Client and municipal agents, commissions, or boards to present and discuss the project as it pertains to the above scope items. This task includes, but is not limited to phone calls, email communication and meeting attendance and items not traditionally included in the scopes above and are necessary, requested by client or client's counsel. OHI has included a total of thirty (30) hours for this task as a budget item. *Any time accrued beyond the allotted hours will be billed at time and expenses per the attached Standard Fee Schedule. For larger scopes that can be readily defined, OHI will submit task descriptions and estimates.*

### **BUDGET**

Services will be provided on an as-needed/as-requested basis after consultation with AKFCPS and are presented as estimates. The final fee will be highly dependent on the exact scope of work, and the tasks assigned by AKFCPS. A suggested budget is provided below:

<b><i>Task 1 – Prepare Existing Conditions Plan</i></b>	<b>\$ 20,000</b>
<b><i>Task 2 – Master Plan Engineering Review and Assistance</i></b>	<b>\$ 15,000</b>
<b><i>Task 3 – Master Plan Traffic and Transportation Review and Assistance</i></b>	<b>\$ 10,000</b>
<b><i>Task 4 – Master Plan Environmental Review and Assistance</i></b>	<b>\$ 15,000</b>
<b><i>Task 5 – Meetings &amp; Coordination</i></b>	<b>\$ 5,000</b>
<b>Total Recommended Budget</b>	<b>\$ 65,000</b>

The recommended budget is intended as a guide only to anticipated fees and is not to be construed as a limitation on the fees to be charged pursuant to this contract. It is understood and agreed that many unforeseen factors that cannot be fully anticipated at this time may influence the final fee associated with this contract. Invoicing will be based on the attached Fee Schedule.


### **SCHEDULE**

Work will be scheduled upon receiving the signed proposal. As the execution of much of the scope is based on the timing of the Master Plan, other parties, and the scheduling needs of AKFCPS, OHI's schedule will revolve around these needs.

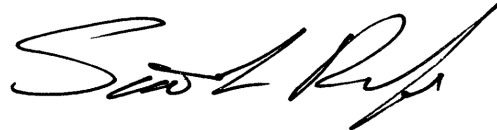
## ***SUMMARY***

The OHI Team appreciates the opportunity to submit our response to the Request for Proposals issued by ACFCPS. We would be pleased to meet with you at your convenience to discuss the project, and our qualifications. Please do not hesitate to contact us should you have questions or comments regarding this matter.

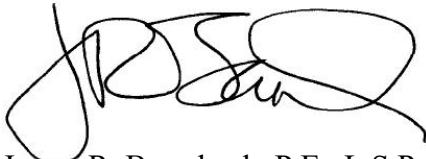
Very truly yours,  
**OHI ENGINEERING, INC.**



Brian G. Snow, PG, L.S.P., L.E.P.  
Senior Project Manager



Scott L. Rolfe  
Engineering Operations Manager



James R. Borrebach, P.E., L.S.P.  
Principal

Attachments: Figure 1  
Qualifications  
Fee Schedule





X:\PROPOSALS\22800 TO\22811 ABBY KELLEY FOSTER SCHOOL - WORCESTER.DWG\ABBY\_KELLEY\_FOSTER.DWG 01-20-23 10:11:41 AM - LAYOUT LOTTING

**OHI**  
**OHI ENGINEERING, INC.**  
ENGINEERS & ENVIRONMENTAL SCIENTISTS  
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ABBY KELLEY FOSTER

NEW GARDEN PARK

SAINT-GOBAIN

GRAPHIC SCALE  
200 0 100 200 400  
( IN FEET )  
1 inch = 200 feet

**FIGURE 1**  
EXISTING LAYOUT  
WORCESTER, MA

ABBY KELLEY FOSTER  
NEW BOND STREET  
WORCESTER, MA





**ABBY KELLEY FOSTER CHARTER SCHOOL  
PROJECT TEAM**

**PRINCIPAL IN CHARGE**

**JAMES R. BORREBACH, P.E, L.S.P.**

**ENVIRONMENTAL MANAGER**

**BRIAN G. SNOW, PG, L.S.P., L.E.P**

**ENGINEERING MANAGER**

**SCOTT ROLFE**

**TRAFFIC/TRANSPORTATION**

**TEPP LLC**

**STORMWATER/ENGINEERING**

**William Blais**

**HEALTH AND SAFETY**

**OccuHealth, Inc.**

**PLANNING AND LANDSCAPE**

**Fisher Design Group**

# ABOUT THE COMPANY

OHI Engineering, Inc. was founded to provide comprehensive environmental and engineering services to industrial/commercial, public and private sector clients.

## Mission

- Create and develop a consulting firm based on the client's needs and expectations
- Consistently deliver more than expected while treating our clients and employees as we ourselves would like to be treated
- Build long-term relationships with our clients and employees based on results, not promises
- Deliver turnkey solutions designed to save our clients time, money and effort

## Staff Qualifications

- Licensed Site Professionals
- Licensed Environmental Professionals
- Professional Engineers
- Professional Geologists
- Waste Water Treatment Plant Operators
- Staff average over 18+ years' Professional Environmental Experience

## Services

- Licensed Site Professional (LSP) services under the Massachusetts Contingency Plan
- Environmental Assessment of potential soil, ground water, sediment, surface water and indoor air contamination
- Design, installation, operation and maintenance of soil and ground water remediation systems
- Underground storage tank removals, installations and compliance
- Soil borings, materials testing and geotechnical evaluations and hydrogeologic studies for infiltration basins
- Litigation support and expert witness services
- Engineering for storm water system, sewer and septic system design and environmental permitting
- Environmental construction oversight, monitoring and management

## Client Sectors

- Industrial/Commercial
- Municipal and Government
- Banks and Lenders
- Contractors
- Consulting Firms
- Energy

## Specialties

Our staff is comprised of Civil Engineers, Geologists, Hydrogeologists and Mechanical Engineers with an average of more than 18 years of professional environmental consulting experience.

### Licensed Site Professional Services

- Over 50 years combined experience
- Regulatory reporting and compliance
- Sudden releases emergency response
- Immediate Response Actions, Release Abatement Measures, Utility-related Abatement Measures
- Phase II Comprehensive Site Assessments
- Phase III Remedial Action Plans
- Feasibility studies and pilot testing
- Public Involvement Plans and support services
- Risk Assessment and Site Closure

### Remediation Services

- Evaluation and remediation of chlorinated solvents from drycleaners and industrial facilities
- Soil excavation, treatment and disposal
- Soil vapor extraction, dual phase extraction, non-aqueous phase liquid extraction
- In-Situ Chemical Oxidation, bioremediation
- Sub-slab depressurization and indoor air treatment systems

### Environmental Assessments

- Phase I and Transaction Screens for property transactions
- Subsurface Investigations
- Groundwater monitoring
- Indoor air quality studies

### Engineering

- Stormwater design and evaluation
- Geotechnical Evaluations
- Sewer/Waste water disposal systems
- Remediation Design
- Wastewater treatment operations

### Construction Services

- Stormwater Pollution Prevention Plans, Dewatering Plans, Soil Management Plans and Conservation Commission Permitting
- Excavation oversight, stockpile sampling and disposal, dust monitoring
- Erosion control monitoring, reporting and compliance
- NPDES Construction General Permits and Remediation General Permits

# Client List

## Municipal/Government

City of Revere  
Town of Wrentham  
Fitchburg State College  
Medway School District  
New Bedford Housing Authority  
Silver Lake Regional Schools  
US Army

## Consulting Firms

Atlantic Design Engineers  
Bartlett Nuclear  
Design Partnership of Cambridge  
Doucet and Associates  
GDP Group  
Hatch Mott MacDonald  
Jewel Corp.  
McArdle Gannon Associates  
New England Environmental  
ProTerra Design Group  
SGC Engineering  
Strategic Environmental  
STV, Inc.  
SW Cole, Inc.

## Contractors

Argus Construction  
Boro Sand and Stone  
Bovis Lend Lease  
Cardi Corporation  
Clean Harbors  
Dowling Corporation  
Geologic Earth Exploration  
J&J Contractors  
Paolini Construction  
Peterson Builders  
R&D Development  
Triumvirate Environmental  
Walsh Corporation

## Banks and Lenders

Bank of Canton  
Key Bank  
Bank of Mansfield  
Middlesex Savings Bank  
SEED Corp.  
Coastal Heritage Bank

## Utilities

Exelon Corporation  
National Grid  
New England Gas Co.  
Rowley Municipal Light Plant  
US Tower  
Vermont Electric

## Industrial/Commercial

Altus Pharmaceuticals  
Ashley Ford  
Cambridge Plating Company  
Churchill Forge Properties  
CRE Management  
Draka Cableteq  
Dunham Realty  
Framingham Ford  
GFI Partners  
Independence Mall  
Helping Hands of America

INCOM  
Mount St. Mary's Abbey  
Paul's Auto Service  
PVI Capital  
Rodman Ford  
Spotless Cleaners  
Surf Cleaners  
Techo-Bloc  
Townsend Ford  
United Housing Management  
Wayland Cleaners  
Water Solutions Group

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Mansfield, MA  
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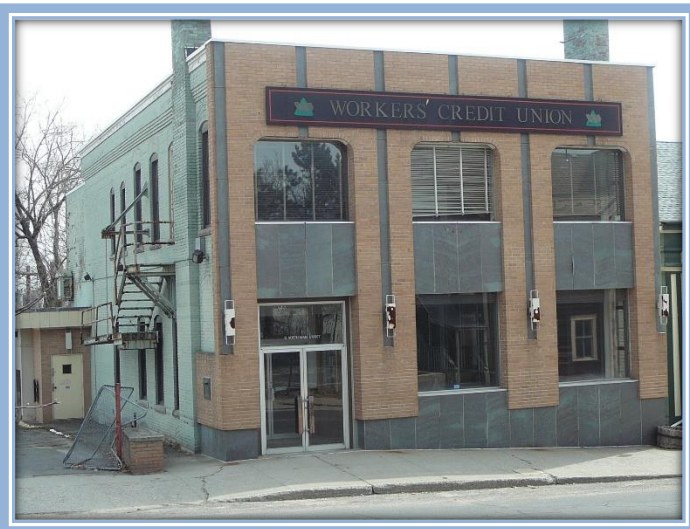
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(802) 885-1909

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## Project Profile – Phase I & II Environmental Site Assessments

### Services Provided by OHI

- Environmental Site Assessments of industrial and commercial properties. The assessments are completed in accordance with ASTM standard practices.
- Facilities range from small commercial properties to large multi-story factories.
- Environmental Site Assessments are typically performed as the due diligence component of a property transaction.
- Sampling and analysis of soil and/or groundwater may be required to resolve potential recognized environmental conditions.
- Typically involve a review of historical records, town files, state files, and a site visit.
- Potential recognized environmental conditions are identified and resolved through further evaluation.



### Typical OHI Assessment Projects

- Large-scale solar power development project involved environmental records review, site assessment and subsurface investigation.
- Multi-unit portfolios of low and moderate income housing developments to support refinancing through US Housing and Urban Development involved environmental records review, site assessment, asbestos evaluations, lead-based paint evaluations, radon studies with mitigation, and subsurface investigation.
- Cellular telephone facilities permitting support involved environmental records review, site assessment and subsurface and geotechnical investigations.
- Historic industrial mill building investigation involved environmental records review, site assessment and subsurface investigations, along with soil management planning for excavation, removal and disposal of impacted soil during redevelopment.

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## Case Study - Phase I & II Environmental Site Assessment

### Project Description

- Standard property transaction due diligence Phase I & II Environmental Site Assessment.
- Completed background research, records review, and site inspection, then proposed a site-specific subsurface investigation focused on potential environmental concerns.
- This property had been a car dealership from 1928 through the 1960s, then a truck repair facility until 1993, and then a machine shop through to the present.
- Environmental records indicated three historic petroleum USTs were installed in 1963. Fire department records indicated two USTs were removed in 1986.
- Four heating oil ASTs were active and present in the current building.
- Petroleum-impacted soil was discovered behind the building.



### Services Provided by OHI

- Preparation of ASTM Phase I-II Environmental Site Assessment Report for bank financing.
- Coordination of subcontracted drilling personnel for monitoring well installation.
- Preparation of Bill-of-Lading for petroleum-impacted soil transport to recycling facility.
- On-Site LSP supervision and confirmatory soil sample collection for Immediate Response Action petroleum-impacted soil excavation.
- Preparation and filing of IRA Completion and Permanent Solution site closure documentation with MassDEP.

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## Case Study Environmental Site Assessment Property Portfolio

### Project Description

- Refinancing of four multi-unit affordable housing portfolios through US Housing and Urban Development.
- Portfolios located in greater Boston area consisted of 72 individual properties containing several hundred apartments.
- Work was conducted on an expedited basis to meet refinancing schedule requirements.
- Additional assessment and mitigation measures were undertaken at several properties to address issues identified during the work.



### Services Provided by OHI

- Prepare Environmental Site Assessment for four property portfolios consisting of 72 properties containing several hundred apartments. The ESA was prepared in accordance with American Society of Testing and Materials (ASTM) E-1527-13 protocols, and to meet requirements of the US HUD.
- Assessments included asbestos evaluations in typical apartments and common spaces concentrating on heating systems. Abatement plans were developed and remediation work was coordinated for those locations where asbestos was identified that required abatement.
- Assessments included radon evaluations of typical apartment and common spaces concentration on lowest level apartment and basements. Design and installation of radon mitigation systems was overseen where radon concentrations exceeded EPA recommended criteria.
- Subsurface investigations were completed where appropriate given historical use of the area

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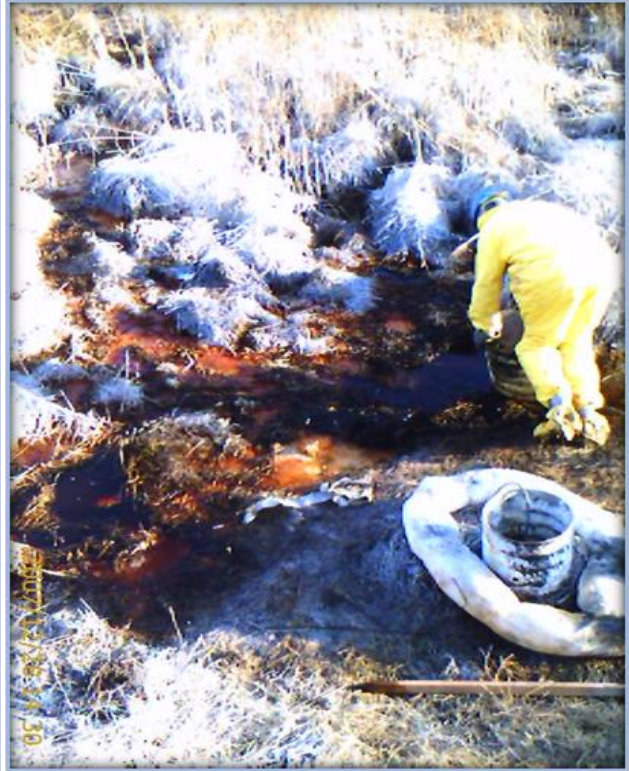
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## Case Study - Emergency Response Southeastern Massachusetts

### Project Description

- Sudden release of 4,000 gallons of ferric chloride used for pH adjustment at a wastewater treatment plant.
- Release occurred during major rainfall event, which caused significant dispersal into the plant's stormwater control system to a detention pond and into adjacent wetlands.
- Subsequent freezing temperatures added significant difficulty to response efforts.
- Pavement, structures, and other infrastructure were affected by the very acidic liquid ( $\text{pH} < 1$ ).
- Over 250 cubic yards of impacted soil and 300,000 gallons of impacted surface water were removed, treated and appropriately disposed.
- The area was neutralized using hydrated lime. Approximately 2,000 gallons of hydrated lime were required to stabilize the ferric chloride.
- The detention basin required significant remediation complicating stormwater management during remediation efforts.



### Services Provided by OHI

- Licensed Site Professional (LSP) services to maintain compliance with the Massachusetts Contingency Plan.
- Coordination with Federal, State, and Local Regulatory officials during and after initial emergency response actions.
- Preparation of regulatory filings submitted to the MassDEP and local Conservation Commission.
- Design, implementation, and oversight of remedial measures to collect, treat, and stabilize the area affected by the release.
- Long-term monitoring to ensure that the environment had been restored to pre-release conditions and preparation of a Class A-1 Response Action Outcome (RAO) Statement.



## Case Study – Enforcement Support

### New Bedford Housing Authority PCBs and Coal Ash

#### Project Description

- US Environmental Protection Agency (EPA) issued a Notice of Potential Liability and Invitation to Perform or Finance Proposed Cleanup Activities for the Parker Street Waste Site to the New Bedford Housing Authority (NBHA). EPA proposed removing 3+ feet of soil from the entirety of a 52 building public housing complex at a cost of over \$20 Million.
- MassDEP and Public Interest Groups also pressured NBHA to remediate.
- The property is impacted with urban fill material containing coal ash placed at the site in the late 1800s and early 1900s. The parcels were taken by eminent domain in approximately 1950 by NBHA for housing.
- The top foot of loam at the site is uncontaminated. Heavy metals and Polycyclic Aromatic Hydrocarbons (PAHs) impacts are present in soil at depths of 1-8 feet.



#### Services Provided by OHI

- Advised NBHA to legally challenge EPA and MassDEP and to contract a qualified Environmental Attorney.
- Performed detailed historical research and reviewed comprehensive soil sampling sets by EPA. Reviewed Parker Street Waste Site documents and data. Definitely proved the property is not in the Parker Street Waste Site. Proved filling of site occurred prior to the Parker Street Waste Site Contamination.
- Coordinated with NBHA, HUD, EPA, MassDEP, City of New Bedford, and Public Interest Groups.
- Prepared and together with counsel successfully argued regulatory exemptions from MassDEP regulation under the MCP and convinced EPA to accept financial liability for response actions. Saved \$20 Million dollars for NBHA.



## Case Study Dry Cleaners and Chlorinated Solvent Sites

### Project Description

- OHI has provided assessment and remediation services at numerous current and former dry cleaners and at Sites where chlorinated solvents have been released.
- Assessments have included soil, groundwater, sub-slab soil gas, indoor air, sediment and surface water sampling and laboratory analysis.
- Remediation measures have included soil excavation and disposal, multi-phase extraction, soil vapor extraction, in-situ oxidation, and sub-slab depressurization.



### Services Provided by OHI

- Prepare Notices of Intent for work near wetland areas.
- Preparation and submittal of design plans and support calculations for remediation systems.
- Licensed Site Professional services in Massachusetts.
- Design, implementation, and monitoring for remediation systems.
- Site specific risk assessments.
- Preparation and submittal of regulatory reports.
- Public Involvement Activities.



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## Case Study Assessment, Remediation & Redevelopment for Reuse Boston

### Project Description

- The project involved demolition, assessment and remediation at 130,000-barrel (5,000,000-gallon) above-ground storage tank.
- A release of #6 oil exceeding 200,000 gallons occurred in the 1990s.
- OHI provided Licensed Site Professional services involving soil borings, groundwater evaluation, and remediation design and implementation.
- After tank demolition, petroleum-impacted soil was excavated and disposed off-Site and an engineered barrier was constructed.
- OHI prepared and implemented a Public Involvement Plan as requested by area residents.
- OHI coordinated with USEPA for RCRA Corrective Action requirements resulting in achievement of "Construction Complete" designation.

### Services Provided by OHI

- Licensed Site Professional Services.
- Filing a Notice of Intent with the City of Boston.
- Site Assessment consisting of over 50 soil borings and 15 monitoring wells with soil and groundwater sampling and analysis.
- Preparation and submittal of design plans and support calculations for the remediation design. Oversight of the demolition, disposal, and construction process.
- Preparation of documents for submittal to the MassDEP.
- Prepare and implement a Public Involvement Plan.
- Resolved RCRA Corrective Action process.



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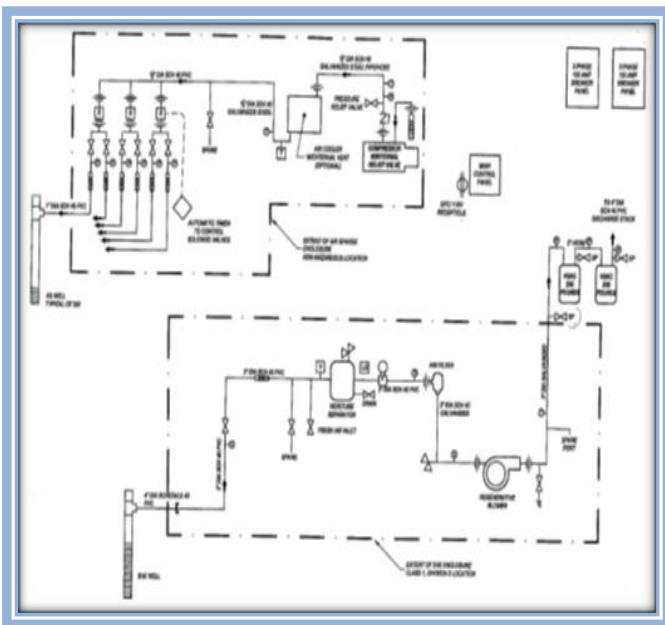
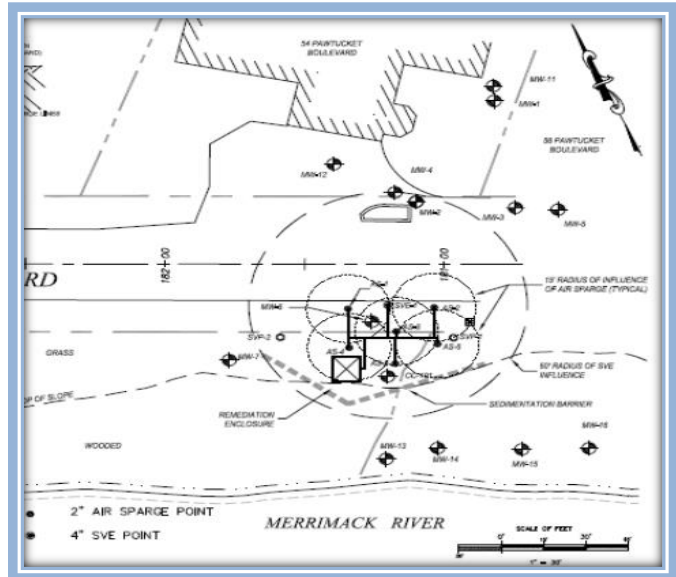
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## Case Study Air Sparge and Soil Vapor Extraction System Gas Station Tyngsboro, MA

### Project Description

- Gasoline Plum Impacting Zone A of a Class A Surface Drinking Water Source as well as within 500 feet of multiple Private Drinking Water Supply Wells.
- Residual Volatile Petroleum Hydrocarbons (VPH) in soil and groundwater.
- Impacts to 3 properties and state highway (MassDOT).



### Services Provided by OHI

- Conducted Soil Vapor Extraction (SVE) and Air Sparge (AS) Pilot Test. The test was conducted in 15 inches of water column (IWC) steps. Vacuum influence measurements were collected in 12 points at 15 minute intervals. Depth to groundwater was also measured to evaluate mounding. SVE influence was measured at 60+ feet at 30 IWC and 50 Cubic Feet per Minute (CFM). Soil gas measurements were utilized to evaluate sparged contaminants.
- The design included 6 AS points and one SVE point. Permits were obtained from MASSDOT and the Tyngsborough Conservation Commission.
- OHI also provided litigation support for pending litigation and negotiated access agreements to install equipment.

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## Case Study Environmental Remediation In Situ Chemical Oxidation

### Project Description

- OHI has designed and implemented In-Situ Chemical Oxidation remediation programs at numerous releases of chlorinated solvents and petroleum.
- Facilities include dry cleaners with releases of Tetrachloroethene, metal working facilities with releases of Trichloroethene, and service stations with releases of gasoline, diesel fuel and fuel oil.
- Oxidants have included persulfates, permanganates, hydrogen peroxide, and proprietary formulations.
- Injections conducted near potential sensitive receptors including daycares, schools, and residences requiring on-site monitoring of subsurface temperatures, sub-slab soil gas, and indoor air.



### Services Provided by OHI

- Design and permitting of injection program.
- Bench scale tests and full scale pilot tests.
- Injection well design and installation oversight and management.
- Design and oversight of field injections activities.
- Monitoring and reporting to maintain regulatory compliance.

## Case Study – Remediation Services Lexington, Massachusetts

### Project Description

- Vacant property was formerly used as a greenhouse. The greenhouses, which had been previously demolished, were painted with lead-based paint.
- Our Client desired to remove residual lead-based paint impacted soil prior to proceeding with future development options.
- The impacted area extended into a Bordering Vegetated Wetland necessitating approximately 2,600 square feet of wetland disturbance and replication of the disturbed area.
- Approximately 750 cubic yards of soil were removed and disposed off-Site at an in-State landfill.



### Services Provided by OHI

- Preparation of Notice of Intent and Wetland Replication Plans, presentation to and approval from the local Conservation Commission. Prepare Construction Stormwater Pollution Prevention Plan.
- On-site soil screening of lead impacted soils using an XRF Meter to help control the extent of excavation both horizontally and vertically.
- Collection of stockpile samples and post-excavation samples for laboratory characterization. Preparation of MassDEP Material Shipping Records for transportation and disposal of excess excavated soil.
- Long-term monitoring of wetland replication area.



**James R. Borrebach, PE, LSP**  
**Principal**

**Education**

Worcester Polytechnic Institute, 1982, B.S., Civil Engineering

**Certifications**

Certified OSHA 40 Hour Hazardous Waste Site Operations (CFR 1910.120)

Certified OSHA 24 Hour Emergency Site Specialist (CFR 1910.120)

Certified 8 Hour Site Supervisor (CFR 1910.120)

**Licensure**

Licensed Site Professional (LSP) in Massachusetts

Registered Professional Engineer in Massachusetts, Vermont, and Rhode Island

**Qualifications**

Mr. Borrebach has over thirty-five years of professional experience in civil and environmental engineering and science and is the President and Founder of OHI Engineering, Inc. His expertise includes: environmental site assessments; hazardous waste site investigations; site remediation and cleanup design, permitting and installation; environmental monitoring and management of Underground Storage Tank removals; hydrogeologic investigations and permit filings under numerous state and local development and environmental statutes. His expertise also includes: engineering site design for residential, commercial and industrial projects, storm water control system evaluation and design, design of retaining walls, sewer systems and water supply systems. He is a Licensed Site Professional in Massachusetts, and a registered Professional Engineer in Massachusetts Rhode Island and Vermont.

He has served as the Licensed Site Professional (LSP) of record for numerous response situations where the release of oil and hazardous materials required the implementation of sound response actions in compliance with the Massachusetts Contingency Plan (MCP). The releases included: releases of gasoline and fuel oil from underground and above ground storage tanks at commercial and industrial facilities, power plants and residences; historical releases of oil and hazardous materials (OHM) at industrial, commercial, and petroleum facilities; accidental spills of petroleum and industrial chemicals; releases of industrial chemicals due to fire; and, impacted soil handling and disposal encountered during building, road and infrastructure construction projects. Mr. Borrebach has served as the Public Participation Plan coordinator for “PIP” sites in Massachusetts and consulted with municipal agencies for public communication regarding a “PIP” Site. He is familiar with the requirements of the Massachusetts Wetlands Protection Act and has conducted response actions at several project sites that required authorization of local Conservation Commissions. He has extensive experience extending over his entire career in coordinating, attending and presenting at public meetings and hearings

Mr. Borrebach has designed and implemented site clean ups involving: excavation of contaminated soil; soil vapor extraction and air sparging; on-site soil treatment using

thermal desorption, asphalt encapsulation, and bioremediation; groundwater pump and treat systems; in-situ chemical oxidation, and dual phase extraction.

Mr. Borrebach has been involved in providing environmental reviews, assessments, remediation feasibility studies and closure reports for Underground Storage Tank removal projects at gasoline stations, industrial facilities, manufacturing companies and residences. His responsibilities included verifying soil and groundwater conditions through field screening techniques, developing and implementing remedial measures, and submittal of closure reports while ensuring compliance with local, state and federal regulations, and in coordination with owners, permitting agencies and contractors.

He has prepared hundreds of environmental site assessments in Massachusetts, Rhode Island, Connecticut, New York and Maine in compliance with ASTM standards or client specifications. The projects were completed for private parties, public entities and, small and large lending institutions.

## **Project Experience**

### *Power Plant Oil Storage Tank Site*

Mr. Borrebach served as the Licensed Site Professional for a historic release of approximately 200,000-gallons of #6-fuel oil from a 130,000 barrel (5,500,000 gallon) above ground storage tank at a power generating facility. He designed and implemented a soil and groundwater assessment program, prepared submittals to the appropriate environmental agencies, helped craft a Public Involvement Plan (PIP) and took a lead role in extensive public involvement program including regular meetings with the public and local governmental authorities, designed and provided construction oversight of the remediation plan involving soil excavation and construction of an engineered barrier, coordinated the RCRA 2020 Corrective Action Audit process that has resulted in a Construction Complete determination and achieved RCRA Termination in mid-2016, and participated in document review for property transactions/sale.

### *PCB Transformer Oil Release*

Mr. Borrebach was the Licensed Site Professional of Record for a release of approximately 600 gallons of PCB-containing transformer oil that occurred during decommissioning of an industrial power plant site. The oil was released in close proximity to a major river in Massachusetts. Shortly after release, a large sheen was noted on the river, and immediate response actions were undertaken to place booms in the river to contain the sheen. The released oil moved onto a nearby beach and impacted the beach and the beach grasses. The release also affected soil in the vicinity of the vault system, sheet piling and piles along the riverfront. Another significant concern was the presence of shell fishing beds further downstream from the release. Assessment and remediation of the release included soil excavation, cleaning and removal of the vault system, and remediation of the affected beachfront. A Site Specific Risk Assessment was prepared as impacts extended to surface water and sediments. The Risk Assessment showed that the remediation was successful in achieving a condition of no significant risk to human health, welfare, safety and the environment. Closure reports were prepared and submitted to the EPA and to the Massachusetts DEP. Work at the site was regulated by both the USEPA under TOSCA and the Massachusetts Department of Environmental Protection.

#### *Industrial Chlorinated Solvent Site*

Mr. Borrebach was responsible for the assessment of an industrial property where high concentrations of chlorinated solvents were discovered. He designed and implemented a remedial system pilot test and installed a dual phase extraction system for the simultaneous removal of soil vapor and groundwater. The design resulted in a groundwater extraction rate that was increased by a factor of ten over that achieved by a typical groundwater extraction well. The design included retrofitting existing monitoring wells to serve as extraction wells thereby resulting in a significant cost savings for system installation. Mr. Borrebach prepared the Release Abatement Measure Plan (RAM Plan), Phase 1 Initial Site Investigation Report, and Tier Classification submittals for the Site in compliance with the Massachusetts Contingency Plan. Groundwater analyses indicated a reduction in dissolved Chlorinated solvents of over ninety (90) percent after the first three months of system operation.

#### *Residential Heating Oil Release*

Mr. Borrebach was the Licensed Site Professional of record for a release of over two hundred gallons of residential heating oil at an ocean front residence in Osterville, Massachusetts. Soils, both outside and underneath the residence were impacted by the release. Mr. Borrebach was responsible for developing a structural shoring system to support the three story residence while excavation was conducted underneath the foundation of the residence. An area of the foundation of over thirty linear feet was exposed during the excavation work with no impact to the stability of the structure. Localized groundwater extraction and treatment was also conducted. Remaining oil concentrations were reduced to the point where a Class A-2 Response Action Outcome was achieved.

#### *Solvent Releases at Dry Cleaners*

Mr. Borrebach is the LSP-of-record for several releases of tetrachloroethene (PCE) at dry cleaning facilities in Massachusetts. The releases have impacted residential homes, day care facilities, schools, churches, and commercial and industrial facilities. The releases have affected soil, ground water, surface water, and indoor air. Remedial measures implemented to address the releases have included soil excavation & disposal, ground water treatment, on-site chemical oxidation, sub slab depressurization systems, soil vapor extraction systems, and, in some cases, were required to abate imminent Hazards. Site-specific Risk Assessments have been prepared to develop clean up requirements and for Site closure purposes.

#### *Geotechnical Evaluations – Power Distribution Infrastructure*

Mr. Borrebach was the Engineer of record for several geotechnical investigations conducted at electrical substations and switchyards. The investigations were conducted to provide evaluate soil conditions, evaluate local conditions of subsidence, and provide engineering design criteria for foundations, pads, and other proposed infrastructure. Evaluations were conducted in Massachusetts, Rhode Island and Vermont.

#### *Elderly Housing Redevelopment*

Mr. Borrebach served as Project Principal for redevelopment of former greenhouses to elderly housing. Lead paint impacts were remediated by excavation and off-Site disposal of impacted soil. An X-Ray Fluorescence (XRF) meter was used to provide real-time assessment of metal concentrations in soil thereby reducing the extent of soil excavated. He was the Principal-In-Charge of site survey, engineering and geotechnical evaluations for a new 49-unit elderly housing project.

## **Brian G. Snow, PG, LSP, LEP** **Senior Project Manager**

### **Education**

Framingham State College, B.S. Earth Science, 1992  
Framingham State College, M.A. Business Administration, 2000

### **Certifications**

Certified OSHA 40 Hour Hazardous Waste Site Operations (CFR 1910.120)  
Certified 8 Hour Site Supervisor (CFR 1910.120)

### **Licensure**

Licensed Site Professional (LSP) in Massachusetts  
Licensed Environmental Professional (LEP) in Connecticut  
Licensed Professional Geologist in New Hampshire, New York and Tennessee  
Massachusetts Waste Water Treatment Plant Operator Grade I-2

### **Affiliations**

Massachusetts Licensed Site Professional Organization  
Town of Medway, MA Conservation Commission  
Massachusetts Notary Public  
Massachusetts Association of Conservation Commissioners

### **Qualifications**

Mr. Snow has over twenty three years of professional experience in environmental engineering and science. His expertise includes: site investigation, bedrock investigations, drinking water treatment, construction support and permitting, remedial design, remediation system construction, operation and decommissioning, remedial additive injections, property assessments, indoor air investigation, litigation support, insurance support, cost assessment, lifecycle costing, compliance assistance, reimbursement support, risk assessment, and regulatory closure.

He has served as the Licensed Site Professional (LSP) of record for numerous response situations where the release of oil and hazardous materials required the implementation of sound response actions in compliance with the Massachusetts Contingency Plan (MCP). The releases included: releases of gasoline and fuel oil from underground and above ground storage tanks at commercial and industrial facilities, power plants and residences; historical releases of oil and hazardous materials (OHM) at petroleum, landfills, commercial and industrial facilities; spills of petroleum and industrial chemicals from transportation accidents; and, releases of industrial chemicals due to fire.

Mr. Snow has directed and completed Immediate Response Actions with associated plans and Response Action Outcome Statements at more than fifty petroleum contaminated sites. He has designed and implemented site clean ups involving: excavation of contaminated soil; soil vapor extraction; on-site soil treatment using thermal desorption, asphalt encapsulation, and bioremediation; groundwater pump and treat systems; in-situ chemical oxidation, and dual phase extraction.

He has prepared hundreds of environmental site assessments in Massachusetts, New Hampshire, Rhode Island, Connecticut, New York, Maine and several other states in compliance with ASTM standards or client specifications. The projects were completed for private parties, public entities and, small and large lending institutions.

## **Project Experience**

### *Gasoline Release- Impact to Indoor Air at Day Care Center and Groundwater Impacts to Zone A of a Drinking Water Supply*

Mr. Snow served as the Senior Project Manager and LSP for a project on the north shore (Massachusetts) where petroleum vapors were detected in a daycare adjacent to the client's property. The project was also within the Zone A of a Class A surface water body. The project included the redesign and re-installation of an existing air sparge and soil vapor extraction system. During the previous consultant's initial indoor air assessment and risk assessments, an Imminent Hazard (IH) was identified. At the client's request, updated indoor air assessment and risk assessment was conducted and revised conclusions to more accurately evaluate risk posed by the release. Subsequent investigations of vapor intrusion pathways included the installation of soil gas probes under and around the daycare at various depths, and sampling of indoor air, soil gas, groundwater, and soil. Numerous IH and substantial hazard evaluations were also completed using Method 3 Risk Characterization. A sulfur hexafluoride tracer gas study was conducted in order to determine the migration pathway of contaminants to the daycare. Contaminants not related to the disposal site were ruled out and attributed to the other remaining businesses in the daycare building. Mr. Snow prepared Immediate Response Action (IRA) Plans, IRA Status Reports, an IRA Completion report, Phase I, II, III, IV, and V documents including a Remedy Operating Status Opinion for the site. His work included design of the Phase II investigation, a pilot test, additional remedial components and demonstrated vacuum influence and source control. He also provided support for litigation related to the indoor air impacts and to previous parties contributing to the release(s).

### *PCB and Metals Impacts to Commercial Property*

Mr. Snow was the Senior Project Manager and LSP for a former industrial site in western Massachusetts. The site was impacted with PCBs, metals and petroleum products. A previous consulting firm conducted an ASTM Phase I for the owner prior to the purchase stating that the parcel was not likely impacted. Subsequently a second ASTM Phase I was conducted by a potential purchaser, leading to an ASTM Phase II Investigation. The property had been historically used for industrial purposes, was adjacent to multiple rail lines and had a former rail spur and siding. He designed an MCP Phase II investigation to delineate the PCBs and metals. Since the project was not in compliance with MCP

deadlines, revised deadlines were negotiated with the MassDEP and penalties were avoided. Impacts at the site extended beyond the property borders, requiring access to multiple parcels including property owned by the power company and the city. The project also included legal support with regard to potential suits against prior owners/occupants and the first consultant. The project included multiple meetings with counsel, opposing counsel, and the MassDEP to gain access and determine damages.

#### *Petroleum Release – Retail Gasoline Station*

Mr. Snow served as the Senior Project Manager and LSP for an emergency response in Lowell, Massachusetts. An owner of a restaurant complained to the Fire Department about petroleum vapors in the basement of their building. Mr. Snow met the Fire Department, Police Department, MassDEP, and Water and Sewer Department at the site. He determined the source of the release was a nearby gasoline station. A carbon filtration system was installed in the basement of the restaurant as well as a series of monitoring wells and soil gas probes. A soil vapor extraction system (SVES) pilot test was completed and a temporary SVES was installed to provide vacuum control and abate an IH condition created by an explosive condition in the sewer lines. The temporary SVES was operational on the second day after the complaint. Follow-up work included the preparation of MCP deliverables, correspondence with the MassDEP and Fire Department as well as the permanent design and install of the SVES and migration pathway assessment.

#### *Remedial Additive Injections - Various Dry Cleaners, Plating Shop, Machine Shops, Gasoline Stations and Residences*

Mr. Snow has directed the application of numerous remedial additives at petroleum and chlorinated solvent sites. Many of these sites include challenging injection environments including in basements below residential buildings, operation of multiple remediation systems, and indoor air concerns. Mr. Snow has completed chemical oxidation projects using various oxidizers. Examples of remedial additives utilized include Regenesis products (HRC, HRC Advance, Regenox Part A and Part B, PerSulfox, ORC) and FMC Products (Klosur – Persulfate with multiple catalysts and stabilizers). Mr. Snow has also utilized numerous Persulfate Products, pH adjusters, catalysts and hydrogen peroxide combinations. Mr. Snow has utilized microbe nutrient injections as well as surfactants. A recent HRC project includes reductions of total chlorinated VOCs (PCE source) in the source area by 95% in the last two years reaching state standard in the majority of impacted wells. A Recent Regenox project include a 72% reduction in chlorinated VOCs in groundwater was over the last year.

#### *US Army Reserve Command – CERCLA and RCRA Corrective Action Management*

Mr. Snow was the contract manager for CERCLA and RCRA Corrective Action Programs for the the US Army Reserve Command in New England. Duties including managing interactions between the US Army Corps of Engineers, US Army Reserve Command, US EPA, and State Departments of Environmental Protection. Projects included assessment and remediation of UST and surface petroleum releases, firing range releases and remediation, maintenance shops, former Nike Missile facilities, former shore battery and command and control structures and bunkers, former Army Airfield, radar/radio tower sites, and heavy equipment use/storage areas. UST compliance was



also managed in this position. Mr. Snow prepared budgets for all activities, prepared government estimates, created investigation and remediation scopes and supervised contractors (through appropriate Army and Corps of Engineers personnel). Mr. Snow briefed and collaborated with command staff, Judge Advocate Staff, Safety Staff, Center base personnel, and Public Affairs Personnel.

#### *Manufactured Gas Plant and Ink Plant*

Mr. Snow managed the MCP Phase I and Phase II Investigations of a commercial property formerly containing a Manufactured Gas Plant (MGP) and Ink Manufacturing facility. The property also contained various commercial activities with USTs and other petroleum use. The investigations included the delineation of coal tar impacts, cyanide impacts, petroleum impacts and metals impacts to soil at concentrations in excess 100,000 mg/Kg. Property use and building locations were traced back to the mid 1800's. Remedial plans include in-situ stabilization, engineered barriers, and use restrictions. The project was designated a Public Involvement Plan (PIP) site by MassDEP. The project also included litigation support.

#### *Industrial Landfill and Process Water Ponds with PCB spill to Surface Water*

Mr. Snow managed the MCP Phase I and Phase II Investigations of a commercial property including the former industrial waste landfill and process water ponds for a large rubber manufacturing plant. Drums of oil and hazardous materials were discovered in the waste within the landfill. Waste was observed in the ponds. The property was impacted with heavy metals, petroleum products and PCBs. A historic release of over 1,000 gallons of 6,000+ ppm PCB oil to the pond system impacted the ponds and drainage upgradient and down gradient. Mr. Snow's assessment included historical research at multiple libraries, maps, documentaries, file reviews at federal, state, and local agencies. The investigation included engineering calculations of stormwater inflow, outflow and sedimentation rates. Sediment thicknesses were established by various hand borings, and tile probe locations as was water depths throughout the ponds. Litigation support included presentations and supporting documentation before attorneys representing multiple parties. Evaluations of past releases, environmental reports and remediation projects for dozens of releases and multiple parcels was completed to evaluate potential sources. Coordination with EPA, TSCA, MassDEP, US Army Corps of Engineers, GSA, DPW, Conservations Commission, abutting property owners, and attorneys were included in the project.



**Scott L. Rolfe**  
**Engineering Operations**  
**Manager**

**Education**

Continuing Education and Coursework at:  
Wentworth Institute of Technology  
Northeastern University  
Boston Architectural Center  
Harvard Graduate School of Design

**Qualifications**

Mr. Rolfe has devoted his entire career to project design, engineering and permitting. His expertise includes: management of engineering site design for residential, commercial and industrial projects; stormwater control system evaluation and design; and, field survey. He is adept at taking projects from conception, through design and permitting, and construction.

**Experience**

Scott has been working in the land surveying and civil engineering field over forty-nine years. Having attended classes with MALSCE, Wentworth Institute of Technology, Northeastern University, Boston Architectural Center and Harvard Graduate School of Design, pertaining to survey mathematics, engineering graphics, landscape design and computer operation, Scott has applied his knowledge and experience within the architectural, surveying, civil engineering and land planning fields.

The early days found Scott working the field as a rodman and survey crew chief, along with corresponding drafting responsibilities. He maintained ownership of a land development services company and has functioned as a director of operations, office manager and senior project manager with a perseverant focus on client relationship.

Scott offers the benefits of his experience as associated with all aspects of planning, design, permitting and client representation within numerous municipalities, and carries extensive knowledge relating to residential, commercial, municipal and industrial development.



## **Douglas C. Morrison** **Senior Project Manager**

### **Education**

University of New Hampshire, B.S. Geology, 1981  
University of Colorado, Graduate Studies in Geology, 1982

### **Certifications**

Certified OSHA 40 Hour Hazardous Waste Site Operations (CFR 1910.120)  
Certified 8 Hour Site Supervisor (CFR 1910.120)  
Certified OSHA Level A, B (CFR 1910.120)  
Certified OSHA Confined Space (CFR 1910.120)  
Certified for use of Portable Gas Chromatograph

### **Affiliations**

Massachusetts Licensed Site Professional Organization, Associate Member  
Massachusetts Association of Land Surveyors and Civil Engineers  
American Congress on Surveying and Mapping  
National Water Well Association

### **Qualifications**

Mr. Morrison has over thirty years' experience on environmental engineering and construction projects throughout the continental United States. Mr. Morrison serves as a Senior Project Manager for OHI Engineering, Inc. He is responsible for the coordination and management of the Company's on-site project operations. He has extensive Construction Management experience at power generating facilities, major pipeline utilities, and commercial, industrial and private projects. Mr. Morrison's duties involve the coordination and supervision of field investigation, sampling, Immediate Response Actions, Release Abatement Measures and remedial activities for waste disposal sites managed under the MCP in Massachusetts and under waste site cleanup regulations in all New England states. He has demonstrated his knowledge of the Massachusetts Contingency Plan (MCP) requirements by preparing Response Action Outcome Statements, Phase I through Phase V reports, Release Abatement Measures, and the filing of Activity and Use Limitations. Mr. Morrison has significant experience in completing Hazardous Waste Site cleanup operations in New York, New Jersey, Kentucky and Florida, serving as the on-site project manager for large-scale remedial projects.

### **Project Experience**

#### *Power Plant Oil Storage Tank Site*

Mr. Morrison served as the Senior Project Manager for a historic release of approximately 200,000-gallons of #6-fuel oil from a 130,000 barrel (5,500,000 gallon) above ground storage tank at a power generating facility. He was the senior manager for

the soil and groundwater assessment program, prepared submittals to the appropriate environmental agencies, designed and provided construction oversight of the remediation plan involving soil excavation and construction of an engineered barrier, assisted in coordinating the RCRA 2020 Corrective Action Audit process that has resulted in a Construction Complete determination and achieved RCRA Termination, and participated in document review for property transactions/sale

#### *New England Peaking Generation Stations*

Mr. Morrison serves as Senior Project Manager for facilities management at three New England peaking generation stations. Services include engineering, management and construction of drainage improvement projects, utility installation including water mains, sewer laterals, commercial septic systems and fire hydrants along with major paving construction projects. Part of these services also include management and construction oversight of plant decommissioning projects with respect to transformers, UST's, AST's and associated piping. Services also include adherence with the Massachusetts Contingency Plan (MCP) for compliance and remediation under the MCP. These services to include geophysical and geotechnical investigations and report preparation and applicable permitting.

#### *National Grid*

Mr. Morrison served as Senior Project Manager for geotechnical investigations at substations throughout Maine, New Hampshire, Massachusetts and Rhode Island. Investigations included the management of permitting, drilling subcontractors, sample collection and laboratory analysis along with report preparation for foundation design. Responsibilities also included management and oversight of health and safety procedures in the electrical transmission industry and adherence to corporate safety policy.

#### *Fibersense Technology Corporation - Boeing Corporation*

Mr. Morrison served as the Project Manager for the assessment and design phase for a sensitive laboratory and, due to the confidence the client gained in the preliminary phase, was awarded the Construction Management oversight for the testing laboratory construction.

Initial assessment provided a geophysical baseline of the subsurface environment, correlating the natural "noise" conditions of the site, as they would relate to gyro testing and production and construction of the instrument foundation pier. The geotechnical investigation determined the depth of the overburden, depth to bedrock and profile of the bedrock surface for pier construction methods and design. The investigation included a geophysical survey of the Site to confirm the Site's natural sensitivity in relation to interference from highways, high-speed commuter train systems, the foundation of the building and other relevant factors.

A 20 foot long by 13 foot wide and seven foot deep excavation was manually chiseled and hand excavated out of bedrock utilizing air hammers and rock splitting tools. The instrument foundation pier was then hand built within extremely close allowable tolerances in four separate concrete pours, all of which were reinforced with steel rebar. Specially designed vibration isolation barriers were part of the construction process, and provided the ability to dampen the natural background "noise" of the Site. Post construction testing indicated that the instrument foundation pier was successfully constructed within very restrictive tolerances.

Once the testing piers were certified, he managed the construction phase for the new testing laboratory. Management included the coordination with the Fibersense engineers and approved subcontractors for the completion of the testing facility. Currently there are approximately 15 piers in the country that are constructed to the specifications of the Fibersense pier.

#### *Former Solid Waste Dumpsite*

Project Manager for an extensive Geotechnical subsurface investigation at a State listed solid waste dumpsite. Project involved delineation of concrete reinforced fill material as placed within the native organic depositional environment. Historically, the site had many excavation/fill events with the concrete waste material being mixed with former lake deposits consisting of organics/peat and timbers. Due to the difficult drilling conditions, a variety of techniques were used to accomplish the project design goals.

The end result of the geotechnical phase was a foundation design with a variety of cost saving options for development of the property as a high-rise condominium complex. Due to a variety of techniques used at the site to delineate the subsurface environment, substantial construction cost savings were implemented in the design-phase to reengineer the fill material as a structural base for foundation construction.

#### *Major Petroleum Bulk Storage Facilities*

Mr. Morrison served as the Project Geologist responsible for the coordination and management of project operations for major oil company retail facilities and active bulk terminals in eastern Massachusetts and Rhode Island. Responsibilities have included design of monitoring well placement and construction; well log and soil interpretation, water quality sampling and monitoring; aquifer evaluation; data control and graphics preparation for detailed waste site disposal and hydrogeologic investigation reports. Mr. Morrison has been involved in all aspects of remedial system design from soil vent and sparging tests to aquifer pump tests and final implementation, as well as subcontractor coordination of the associated remedial systems.

Mr. Morrison has been responsible for the project management of underground storage tank (UST) removal operations throughout New York, Massachusetts, Rhode Island, and Vermont. His duties on these projects included the coordination of subcontractors, and supervision of field operations, data collection and management of the preparation of final closure reports for submittal to appropriate state regulators.

Mr. Morrison has played a critical role in the performance of comprehensive hydrogeologic investigations and environmental site assessments for major national oil companies to assess the presence and evaluate the extent of petroleum hydrocarbon contamination. Duties on these projects included identifying and evaluating possible source areas, and identifying potential receptors of migrating contamination. Site history research and environmental assessment activities at these sites have included: review of current and historic property use; the characterization of subsurface soil; development of site-specific media sampling plans; preparation of the design and supervision of the installation of groundwater monitoring wells; soil and groundwater sampling; sample handling and coordination of appropriate laboratory analyses.

#### *Comprehensive Environmental Site Investigations - Fuel Oil Terminal*

Mr. Morrison served as the Project Geologist for a comprehensive site assessment at a major New England fuel oil terminal. His responsibilities included the coordination and implementation of all on-site field activities for petroleum plume delineation. The

investigation included the installation of 38 groundwater monitoring wells (both in bedrock and in overburden), performance of test pits, and implementation of extensive soil gas surveys with mobile lab gas chromatography (GC) analyses. The project also involved the decommissioning and excavation/removal of over 500 miles of underground petroleum pipelines on terminal property and along rights of ways. Other investigation duties included: surface water and soil sampling; complete site survey and data collection for map preparation; bedrock mapping and fracture trace analyses; extensive file and record reviews of both state and federal records; preparation of groundwater contour, bedrock, and subsurface utility plans (both historic and current), surficial topography maps and contaminant isopleth maps.

*Site Remediation, Camden, New Jersey*

Mr. Morrison served as the Construction Manager for soil remediation of an impacted site in Camden, New Jersey. The project involved the excavation, treatment and disposal of approximately 32,000 tons of impacted soil. Mr. Morrison coordinated all aspects of the engineering of the project for thermal destruction of the soils, resulting in reduced permitting requirements when compared to on-site treatment. The use of the off-site treatment facility resulted in a cost savings of approximately \$250,000 when compared to methods proposed by other consultants involved in the project. The project had been in litigation since 1984 and implementing strategic methodology and management approach enabled site closure under NJDEPE regulations.

## **Lyons Witten, PG, LSP** **Senior Project Manager**

### **Education**

University of Colorado, B.A. Geology, 1983  
University of Massachusetts, M.S. Geology, 1994

### **Certifications**

Certified OSHA 40 Hour Hazardous Waste Site Operations (CFR 1910.120), 1986  
OSHA 8 Hour HAZWOPER Annual Refresher, 1987 to present  
OSHA HAZWOPER Supervisor's Course, 2002 and 2012  
Amtrak Contractor Employee Safety Training, Certificate No. 1456

### **Licensure**

Professional Geologist in New Hampshire  
Licensed Site Professional (LSP) in Massachusetts

### **Qualifications**

Mr. Witten has over thirty years of professional experience in groundwater- and hazardous waste-related projects. His expertise includes: Phase I and II hazardous waste site investigations; management of Underground Storage Tank removals; site remediation including remedial system design, permitting, and installation; and permit filings under numerous state environmental statutes. He has overseen hundreds of assessment and remediation projects that included in-situ chemical oxidation, pump and treat, vapor extraction, excavation, stabilization, and bioremediation remedies. He has experience in numerous projects for both public and private clients that involve the interaction of water supply wells and hazardous waste sites.

He has served as the Licensed Site Professional (LSP) of record for numerous response situations where the release of oil and hazardous materials required the implementation of sound response actions in compliance with the Massachusetts Contingency Plan (MCP), many which also involved the Wetlands Protection Act and required authorization of local Conservation Commissions. The releases included: releases of gasoline and fuel oil from underground and above ground storage tanks at residential, commercial, and industrial facilities; historical releases of oil and hazardous materials (OHM) at industrial, commercial, and petroleum facilities; and historical releases of heavy metals at former industrial facilities.

Mr. Witten has also completed numerous water supply projects that involved field investigation and permitting for new and expanded water supply sources, pump tests, computer modeling of small-scale and town-wide aquifer systems, and Site-specific mapping of aquifer materials for various permitting needs. His expertise in this area lies in field testing, permitting, and computer modeling.

He has prepared hundreds of environmental site assessments in Massachusetts, Vermont, Connecticut, New York, New Hampshire and Maryland in compliance with ASTM standards or client specifications. The projects were completed for private parties, public entities and, small and large lending institutions.

Mr. Witten has served on a Planning Board, been a Town Meeting Member, and has extensive experience in coordinating, attending and presenting at public meetings and hearings.

## **Project Experience**

### *Hydraulic Fluid Release*

LSP-of-Record for cleanup of this long-term release of hydraulic oil from two industrial air compressors. The units discharged a mixture of oil and condensate to the ground surface for up to 30 years. Impacted soil was excavated and recycled into asphalt. Groundwater had not been impacted. The remediation was conducted under the Limited Removal Action clause of the MCP, allowing remediation to be completed without formal notification to the DEP.

### *Remedial Feasibility Investigation (RFI) Site*

Conducted soil and groundwater sampling, developed new monitoring wells, conducted slug and pump tests, and assisted with waste management during a RCRA remedial feasibility investigation (RFI) at a large Connecticut defense manufacturing facility.

### *PCB Investigation Site*

Project Hydrogeologist on a petroleum remediation site involving Underground Storage Tank removals, product recovery by pump and treat methods, and PCB contamination. This relatively simple remediation project for a private food service industry client was complicated by cross-contamination of a monitoring well with PCBs by another contractor. The project revolved around an investigation of all possible sources of the PCBs at the historically industrial Site to rule out an on-site source prior to the client seeking restitution from the responsible contractor. Restitution from the contractor was achieved.

### *Former Plating Facility Investigation*

LSP-of-Record on this remediation project for a private landowner. Multiple field investigations lead up to the preparation of a MCP Phase II and III report for the Site that delineated the extent of contamination both along a river bank and within the boundaries of a former industrial landfill at the Site. Portions of this Site were closed using a Permanent Solution including an Activity and Use Limitation (AUL) while portions were closed using a Temporary Solution with an AUL.

### *Cell Towers*

Project Manager for ESA and geotechnical evaluations of soil for foundation and site work design at proposed cell tower and solar array facilities across New England for the last 18 years. Clients included several different cell tower and solar energy developers. Projects ranged from single sites to groups of six to eight at a time.



#### *Underground Storage Tank Removal Site*

Project Hydrogeologist on a redevelopment project for a private developer. The project involved removal of 27 Underground Storage Tanks, five buildings including two truck garages, and the recycling of 5,000 cubic yards of petroleum- and metals-contaminated soil. Contracts were held with both the Site owner and the potential purchaser, and the project resulted in the award of the first two Form Four permits ever issued by the Connecticut Department of Environmental Protection.

#### *Industrial Chlorinated Solvent Disposal Site*

Project Hydrogeologist for a private industrial client with chlorinated solvent contamination resulting from leaking buried drums. Coordinated the quarterly sampling of private drinking water wells in the vicinity of the Site, and completed an Immediate Response Action with associated plans for the installation of point-of-entry carbon filters at several of these homes. Completed the field program for a Phase II Comprehensive Site Investigation of the Site.

#### *Former Dry Cleaning Facility*

LSP-of-Record for a private dry cleaner at a re-developed property. Chlorinated solvents were found under the new building and have been remediated using reductive dechlorination in combination with a soil-vapor extraction system and changes to the on-site HVAC system to provide positive pressure to the new building. Phase II, III, IV, and Phase V Status Reports have been prepared for this Site.

#### *Landfill Monitoring and Expansion*

Managed and designed quarterly groundwater and soil sampling programs for landfills and sewage treatment plants. Mr. Witten conducted quarterly sampling at the Ravenbrook Landfill in North Carver, Massachusetts during a four-year period, and conducted subsurface geotechnical and hydrologic investigations for two expansions of this landfill.

#### *Septic System Mounding Analyses*

Mr. Witten designed, calibrated and utilized site-specific VisualMODFLOW models to estimate the height of groundwater mounding under proposed large septic systems (>10,000 gpd). These Hydrologic Mounding Analyses are preceded by soil and groundwater sampling programs to characterize the subsurface materials, slug or pump tests to determine hydraulic conductivity, and a literature search to collect relevant published information. The groundwater flow model can also be used as a contaminant transport model to estimate concentrations of contaminants (nitrate) at the downgradient property line or nearest critical environmental resource. The Hydrologic Mounding Analysis reports are submitted in support of the Groundwater Discharge Permit Application for the system.

#### *Site Development ESA and Geotechnical Studies*

Mr. Witten has completed numerous comprehensive re-development strategy projects involving Environmental Site Assessments, geotechnical evaluations of soil for foundation and site work design, and the interaction of client's re-development goals with the limitations posed by Site permitting and contamination issues.



## Water Supply Projects

### *Water Management Act & NPDES Permit*

Mr. Witten determined the best location for additional irrigation wells for a private farmer, oversaw the installation of the new wells, and applied for and received a Water Management Act Permit for four times the farm's original WMA withdrawal. A corresponding NPDES discharge permit application was prepared and approved by EPA.

### *New Source Approval - Private*

Mr. Witten supervised the installation of a proposed public water supply well for a private client in Wrentham, Massachusetts, conducted required sampling, and completed a New Source Approval submittal to the DEP. This project involved interaction with the engineer designing the proposed development and associated on-site septic system, and modeling the septic system mound on the water table using VisualMODFLOW. Mr. Witten was also on a team that prepared a New Source Approval submittal to the DEP for a series of irrigation wells for a proposed golf course in Hingham, Massachusetts.

### *New Source Approval - Public*

Mr. Witten has supervised the installation of numerous test wells in the search for a proposed public water supply wells in the Town of Dudley, MA. He was involved in the permitting of a new water supply well for the Town of Kingston, MA, demonstrating via a computer model that this well location was outside the actual limits of the Jones River Basin, an area closed to further withdrawals by DEP.

### *Zone II Delineation*

Mr. Witten delineated Zone II boundaries for the protection of two municipal water supply wells in the Town of Lanesborough, Massachusetts. This project involved determination of the vertical and horizontal extent of the principal aquifer using classic geologic field investigation and seismic refraction survey techniques, the installation of monitoring wells and stream-bed piezometers, and the formulation of a MODFLOW computer model to simulate the aquifer under pumping and non-pumping conditions.

### *Aquifer Land Acquisition Study*

This study for the Towns of Easthampton and Southampton was funded under the Massachusetts Ch. 286 Aquifer Land Acquisition (ALA) Program. The study delineated Zones II and III of the Hendrick Street and Nonotuck Park Well fields, addressed the impact of potential contaminant sources on the Easthampton Aquifer, and recommended strategic properties for acquisition to further protect this drinking water resource.

### *Water Supply Protection*

Mr. Witten has employed several strategies for the protection of public and private water supplies including: delineation of Zone II boundaries for the protection of municipal water supplies, design hypothetical subdivision layouts for appraisals and the APR Farm Program, and completion of nitrogen loading analyses for proposed developments. Mr. Witten is also a member of his local town Aquifer Protection Committee.

### *Hydrologic Assessment of Duxbury Landfills*

A hydrogeologic contaminant study was conducted to evaluate potential groundwater quality impacts from the Duxbury, Massachusetts landfill sites. The two landfills are situated directly upgradient of one of the Town's drinking water supply wells. The project objective was to define the hydrogeology and to determine the leachate plume's chemical composition, document its vertical and horizontal extent within the aquifer, and therefore to estimate its eventual impacts to the well.



**Jared Kelly**  
**Project Engineer**

**Education**

University of Massachusetts – Amherst, B.S. Astrophysics, 2005  
University of Massachusetts – Amherst, B.S. Mathematics, 2005  
University of Massachusetts – Dartmouth, M.S. Mechanical Engineering, 2014

**Certifications**

Engineer in Training  
Certified OSHA 40 Hour Hazardous Waste Site Operations (CFR 1910.120)  
Holder of Transportation Worker Identification Credential (TWIC) Card  
First Aid and CPR  
Smith Defensive Driving Certification  
Qualified Preparer of Stormwater Pollution Prevention Plans  
Qualified Compliance Inspector of Stormwater (QCIS)

**Qualifications**

Mr. Kelly has eight years of stormwater erosion control experience in geotechnical and civil construction projects and serves as a Project Engineer/Erosion Control Specialist for OHI Engineering, Inc. Mr. Kelly is a qualified preparer of Stormwater Pollution Prevention Plans, Qualified Compliance Inspector of Stormwater (QCIS), and has authored many Erosion and Sedimentation Control (ESCP) plans for large construction projects. He provides site-specific stormwater runoff assessment, project Stormwater Pollution Prevention Plan and electronic Notice of Intent preparation, erosion control and best management practice recommendation and implementation oversight, and erosion control site inspections for National Pollution Discharge Elimination System (NPDES) certification under the EPA Construction and Multi-Sector General Permit (CGP and MSGP) programs.

Mr. Kelly has authored SWPPPs and ECSPs for many large Massachusetts Department of Transportation (MassDOT) contracts and is current in the updated language of the 2017 CGP. His project management experience includes serving as Environmental Compliance Manager for construction of the Massachusetts Water Resources Authority's Spot Pond Water Storage Facility; a +\$50 million design/build project. During the project, which spanned three years, Mr. Kelly was responsible for weekly stormwater compliance recommendations, monthly compliance inspections, preparation of monthly and annual summary reports, and coordination with the General Contractor and federal/state/municipal regulatory agencies.

Statement of Qualifications for  
**OccuHealth, Inc.**

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# OccuHealth, Inc.

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Thank you for considering OccuHealth, Inc. as a partner in helping you achieve your environmental, health, and safety objectives. OccuHealth, Inc. (OCCUHEALTH) is a well-established and respected consulting firm in the New England region. The enclosed qualification is intended solely for your use and is offered to provide you with insight into the consultancy and how its staff and services can add value to your organization by addressing your environmental, health, and safety risks.

## At A Glance:

Company: OccuHealth, Inc.  
Staff: Combination of professional and technical staff  
Incorporated: 1989

Address: 44 Wood Avenue, Mansfield, MA 02048  
Phone: (508) 339-9119, (800) 729-1035  
Fax: (508) 339-2893

Website: [www.occuhealth.com](http://www.occuhealth.com)

## The Beginning:

In 1986 Mr. Thomas E. Hamilton (President and Founder) recognized that the New England region was in need of a consulting firm that could offer valuable, timely, and cost effective engineering solutions for industries dealing with Environmental, Health, and Safety issues. Since the company's initial inception in 1986 and incorporation in 1989, Mr. Hamilton has focused on ensuring client needs are met by acquiring, developing, and maintaining some of the best professionals the region has to offer.

## The Present:

OCCUHEALTH has expanded its professional services by assembling a talented, experienced staff. This has given OCCUHEALTH a competitive advantage over other regional consulting firms as we have expertise in diversified subjects that will assist you in all functional aspects of your EH&S program.

## The Future:

OCCUHEALTH's plan for future success involves maintaining the goodwill we have established over that last 30 years of service and building on our customer base with prospects like you. OCCUHEALTH continues to acquire key talent and has the infrastructure in place to expand as our customers and industry demand.

## Core Values:

Our staff is bound by a common thread to provide the best possible work product for our customers. In addition, all senior level staff maintain professional credentials which bind them to a set of ethical standards and/or codes of professional conduct. Inherent to each of these is:

- Respect – our clients are treated as an extension of our staff. Each member of our staff is treated with the utmost respect.
- Honesty – much of the work we provide is done under extreme confidence and trust between our staff and our clients which ensures mutual success. Open and honest business practice is guaranteed.
- Integrity – OCCUHEALTH's success has been driven by our goodwill. Many of our decisions and recommendations can profoundly affects the health and safety of the employee or the environment. These are decisions that OCCUHEALTH does not make lightly.
- Competency – All too often we see competitors trying to provide a variety of services and expertise that they don't have. OCCUHEALTH is confident we can address almost any issue as it relates to EH&S; however, if a project involves a skill set that is outside of our competencies we will work with you to identify the best and most competent alternative. OCCUHEALTH would rather not offer you a service then provide you one of poor quality.

## OCCUHEALTH's Key to Success:

Staff – A firm is nothing without its staff. OCCUHEALTH works hard to acquire and keep the best talent in the region. Our technical staff consists of:

- Registered Professional Engineers
- Certified Project Manager
- Certified Industrial Hygienists
- Certified Safety Professional
- Toxic Use Reduction Planner
- Certified Environmental Safety & Health Trainer

# OccuHealth, Inc.

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Location – OCCUHEALTH is strategically located in Mansfield, Massachusetts to ensure prompt on site support to major New England cities including:

- Boston, MA
- Worcester, MA
- Providence, RI
- Groton/New London, CT
- Hartford, Ct
- Portsmouth, NH



Value – OCCUHEALTH understands the importance of operating lean. Our clients are expected to acquire staff, products, and services that are as cost sensitive as possible. As such, there is no reason why OCCUHEALTH shouldn't be expected to do the same on our customers' behalf. Our rates are highly competitive, especially when the cost vs. staff experience is considered. You will find our rates to be comparable or less than our competitors and there is no reason it shouldn't be.

Our success and commitment to our clients is also highlighted in the A+ rating we have ranked with the Better Business Bureau:



The *Health & Safety Division* of OCCUHEALTH works to provide comprehensive solutions to protect the health and safety of your employees, visitors, and contractors. This is critical to ensure both regulatory compliance and reduction in workers compensation.

Our Services are comprehensive and include:

## Indoor Air Quality Assessments / Surveys

Air quality is one of the most important factors in keeping employees healthy and productive at work. Our services can determine the cause of an air quality problem or help prevent it before it occurs. Investigations and monitoring for comfort parameters like carbon dioxide, carbon monoxide, temperature and relative humidity or testing for allergens, or VOCs from building materials are just some of the capabilities we offer.

## Indoor Microbial Assessments

Microbial contaminants such as fungi (mold) and bacteria can cause a variety of health problems in the workplace. Besides irritation and discomfort, certain types of mold can actually be hazardous to health. OHI is fully equipped to identify the root cause of your particular issue and ensure a fast and efficient solution. Our services include identification and assessment of any existing or potential problems and issues, remediation plan development and design, and post-remediation testing for verification.

## Industrial Hygiene Surveys

Recognizing workplace hazards can be challenging, and implementing engineering, administrative, and personal protective equipment controls to address these hazards can be a daunting task. This is where the science of Industrial Hygiene can help. OCCUHEALTH's industrial hygienist are devoted to anticipating, recognizing, evaluating, preventing, and controlling environmental factors and stresses present in the workplace. These factors and stresses have the ability to cause sickness, impair health and well being, or cause discomfort among workers and the general public. We have the capability of evaluating all chemical, physical, and biological hazards that may be present in the work place.

## Occupational Safety & Health Program Development & Support

Every work situation is different as are the needs of our clients. Whether you need a written Lockout / Tagout Program developed or simply need compliance driven Bloodborne Pathogen training, OCCUHEALTH can deliver. Our staff is experienced in the nuances of both Construction & General Industry regulations and we will pass our knowledge on to you.



## Health & Safety Auditing

One of the most effective and valuable approaches to ensuring the safety and health of your organization is through auditing. Our auditing approach is as dynamic as you are. We can conduct a key findings assessment targeting certain aspects of your Health and Safety program or we can conduct a comprehensive audit of your entire facility through a three tiered approach of Interviews/Questionnaires, Written Program Review/Verification, and Safety Walkthrough. Either way, the deliverable is a prioritized list of how and where to focus your resources for success.

Some firms will just offer a list of problems that you as the client are left to deal with on your own. OCCUHEALTH has leveraged itself in the New England region to not only identify problems but also implement cost effective solutions.

## Health & Safety Training

OCCUHEALTH takes our responsibility as educators very seriously. Our training programs meet or exceed all regulatory standards. We also constantly review and update our training programs to be topical and relevant to current health and safety issues. Our training programs encompass the requirements of the Environmental Protection Agency (EPA), Occupational Safety and Health Administration (OSHA) and Department of Transportation (DOT) as well as state specific requirements for both occupational safety and environmental protection.

OCCUHEALTH understands that you have a business to run, which is why we have offer online, computer based training (CBT) to meet your individual needs and resource restraints.

OCCUHEALTH's *Environmental Division* consists of engineers and scientists devoted to ensuring your organization complies with all applicable regulatory requirements that have been developed to protect the environment.

## Environmental Permitting

OCCUHEALTH is knowledgeable in all aspects of air permitting to ensure compliance. Our services include emissions calculations, analysis of air dispersion modeling, stack testing oversight and analysis, document preparation, and negotiations with regulatory agencies.

OccuHealth, Inc routinely provided ongoing industrial hygiene, IAQ, biosafety, and training support to some of the world's largest biotechnology and pharmaceutical clients. OCCUHEALTH performed an engineering validation of process equipment containment using a surrogate material. The values of surrogates are they are relatively benign in nature and analytical costs for air and surface sampling are less expensive. Our assessment of one particular engineering control revealed that adequate containment to a high potency active pharmaceutical ingredient (API) could be achieved with existing engineering, administrative, and personal protective equipment (PPE) controls. This resulted in \$2.5 million in retrofit cost savings and allowed continued research and development of the API without delays.

OccuHealth, Inc. was called upon to review and prepare a research and development pharmaceutical facility for an impending state laboratory inspection. OCCUHEALTH identified and resolved gaps in both their training records and verification of lab safety equipment prior to the site inspection. This ensured the labs which worked with etiological agents and labs maintaining clinical laboratory certifications were re-licensed by the state. Immediate and timely identification and resolution of issues prevented closures/delays in the use of client lab spaces.

A manufacturing subsidiary of a national corporation was involved with a Corporate EHS audit which identified broad-based EHS deficiencies that the subsidiary needed to rectify within 18 months. The company quickly identified that they did not possess the in-house talent to address the deficiencies in the prescribed timeframe. OCCUHEALTH was tasked with integrating into their organization and providing part-time EHS support for an 18 month period to establish a best-in-class EHS program that could then be transitioned to internal staff to maintain. OCCUHEALTH accomplished this feat within budget and ahead of schedule which was well-received by shareholders and corporate.

Frequent and unexpected relocations can present unique challenges such as how to properly remove waste, clean areas for re-occupancy, and demonstrate the safety to stakeholders. One project for an academic institution required OCCUHEALTH to develop a strategy and criteria for demonstrating the cleanliness of a biosafety level 2 laboratory that was to be vacated. OCCUHEALTH used a combination of remediation approaches common in mold cleanup with analytical technologies used to evaluate adenosine triphosphate (ATP) levels to quickly and efficiently review areas that were clean and areas needing additional attention. ATP levels were used as a surrogate of biological activity. This provided quick and timely feedback to cleaning crews which reduced laboratory down time and satisfied the concerns of stakeholders.

An international, high tech manufacturing company decided to improve its due diligence and address stakeholder concerns regarding health and safety by working towards the achievement of the Occupational Health and Safety Assessment Series 18001 Management Certification for Health & Safety. This firm partnered with OCCUHEALTH to help establish the framework that was critical in their OHSAS 18001 certification. OCCUHEALTH was then retained to help two additional manufacturing sites achieve the international health and safety management certification

A prestigious private university was experiencing unpleasant odors in a faculty dorm where tenured professors lived. Assessments performed by other firms occurred for approximately 2 years with no identification of the source. It was determined that the university had spent \$80,000 with other firms before they contacted OCCUHEALTH. Through the use of smoke generating technologies, OCCUHEALTH determined that waste drains had dried allowing sewer-like odors to re-enter the apartment building. OCCUHEALTH's cumulative costs for identifying the issue was less than \$5,000. OCCUHEALTH then helped establish a maintenance program for the university and no complaints have been received since.

**Section 6:     Partial Client List**

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Our value added services have benefitted many clients in a variety of industries. Below is a list of specific clients we have assisted in the past and many we continue to work with today:

- Towns / Cities / Municipalities:
  - Boston, MA:
  - Pittsfield, MA
  - Cambridge, MA
  - Rochester, NH
  - Framingham, MA
  - Marion, MA
  - Needham, MA
  - Oak Bluffs, MA
  - Barnstable MA
- Property Management
  - Aspen Square
  - Blue Mountain
  - Hingham Woods
  - ING Clarion Realty Services
  - Millennium Partners
  - MB Management
  - Trammell Crow
  - State Street Corporation Realty Services
  - Spaulding & Slye
  - United Housing
- Education / Academia
  - Public School Systems for:
    - Massachusetts
      - Amherst
      - Attleboro
      - Burlington
      - Cambridge
      - Canton
      - Carver
      - Cranston
      - Lowell
      - Harvard
      - Norwood
      - Peabody
      - Plymouth
      - Wareham
    - Rhode Island
      - Lincoln
      - North Smithfield
      - Providence, RI

- Colleges / Universities
  - Salem State College
  - University of Massachusetts
    - Amherst
    - Dartmouth
  - University of New Hampshire
  - University of Massachusetts Medical School
  - University of Rhode Island
  - Rhode Island School of Design
  - Boston College
  - Brown University
  - Curry College
  - Berklee College of Music
  - Harvard University
- Manufacturing
  - Applied Biosystems
  - Babs Foundry
  - Draka Cableteq
  - EMC Corporation
  - Factory Five Racing
  - Hasbro
  - Senior Operations
  - Waste Management
  - Lista International Corp.
- Healthcare / Medical
  - Beth Israel Deaconess Med Center
  - Cape Cod Hospital
  - Cooley Dickinson Hospital
  - Falmouth Hospital
  - Faulkner Hospital
  - U Mass Memorial Medical Center
  - Memorial Hospital of R.I.
- Biotechnology / Pharmaceutical
  - Astra Zeneca
  - GE Healthcare Biosciences Corp.
  - Pfizer, Inc.
  - Serono
  - Charles River Laboratories
  - Rhodes Technologies

- Utilities
  - Bay State Gas
  - Boston Gas Company
  - Boston Edison Company
  - NiSource
  - New England Gas
- Construction
  - CWC Construction
  - Modern Continental/Obayashi
  - P. Gioioso & Son, Inc.
  - RF Walsh Company
  - Thorndike Construction
  - Thoughtforms
  - Gilbane
- Insurance
  - Amica
  - The Andover Companies
  - Chubb
  - Fireman's Fund
  - Liberty Mutual
  - NLC Insurance
  - The Hanover Insurance Co.
  - State Farm
  - Safety Insurance
- State Agencies
  - Massachusetts Div of Capital Asset Management
  - Massachusetts Water Resources Authority
  - County of Plymouth - Correctional Facility, Mass Department of Correction
  - Mass Turnpike Authority
- Legal
  - Clark, Hunt & Embry
  - Devine, Millimet & Branch
  - Parker, Anker & Horstmann
  - Sulloway & Hollis
  - Shepard S. Johnson, Jr. & Assoc.
  - Vetter & White

## Key Staff Qualifications / Profiles

THOMAS E. HAMILTON, CIH  
President & Founder

EDUCATION:  
B.S. Metallurgical Engineering, Michigan Technological University

CERTIFICATIONS / PROFESSIONAL CREDENTIALS:  
Certified Industrial Hygienist

PROFESSIONAL MEMBERSHIPS:  
American Industrial Hygiene Association  
New England American Industrial Hygiene Association  
American Society of Heating, Refrigerating, and Air Conditioning Engineers

EXPERIENCE:  
Mr. Hamilton is President and Founder of OccuHealth, Inc., and has been certified in the Comprehensive Practice of Industrial Hygiene since 1980. Mr. Hamilton's years of experience within the engineering and industrial health community provide him with a unique and unparalleled background for evaluating and developing workable solutions to the highly-complex and multi-faceted health and safety problems that confront industry today.

Mr. Hamilton is regarded as a subject matter expert on issues pertaining to indoor air quality and resolving "sick building syndrome". He has also been qualified as an expert witness in the area of mold and mold remediation. His experience has allowed him to become well versed in the areas of indoor air quality and odor forensics.

Mr. Hamilton frequently serves as a value added resource to a company's corporate department on decisions that impact an organization's health and safety business risks. Mr. Hamilton not only participates in problem identification, but he also offers resolutions, previously not considered, which often yield a more streamlined approach. He does this work because he passionately cares about the well being of clients, employees, the general public, and a client's bottom line.

His extensive experience in the field of industrial hygiene includes 16 years with W.R. Grace & Co. where his career culminated in directing the Corporate Industrial Hygiene Program for the Industrial Chemicals Group, which was the largest division within the company. He developed programs to address critical issues including exposure monitoring, noise, hearing conservation, ventilation design, OSHA compliance, and indoor air quality.



A. DAVID SCARCHILLI, MS, PE, BCEE  
Vice President

EDUCATION:

M.S. Environmental Engineering, Rensselaer Polytechnic Institute  
B.S. Civil Sanitary Engineering, Northeastern University

CERTIFICATIONS / PROFESSIONAL CREDENTIALS:

Registered Professional Engineer - Massachusetts  
Board Certified Environmental Engineer, Air Pollution Control

PROFESSIONAL MEMBERSHIPS:

Air and Waste Management Association  
Academy of Environmental Engineers

EXPERIENCE:

Mr. Scarchilli is Vice President at OCCUHEALTH with more than 35 years of experience in environmental engineering. Mr. Scarchilli specializes in assisting clients achieve environmental regulatory compliance and maintaining safe and healthy indoor environments. His fields of expertise include environmental auditing, industrial ventilation design, and air quality assessment and management.

He has conducted environmental audits at domestic and international facilities, both as a member of in-house audit teams and as an independent consultant where his audit objectives included both regulatory compliance and environmental management systems. Mr. Scarchilli served as a member of the U.S.S Technical Advisory Group (TAG) to ISO/TC 207 on Environmental Management, i.e. ISO 14000 during the Draft International Standard comment period.

Mr. Scarchilli has designed, installed and tested industrial ventilation systems for the control of both particulate and vapor contaminants. OCCUHEALTH was presented with the Honor Award for Design Excellence by the Boston Society of Architects (BSA) and the American Institute of Architects, with a Citation for Design for Mr. Scarchilli's work at Simons Rock College of Bard. Mr. Scarchilli authored a chapter entitled "Evaluating Ventilation Systems," which is found in the book *The Occupational Environment: it's Evaluation, Control, & Management*, published by the American Industrial Hygiene Association.

Mr. Scarchilli's air quality assessment and management experience includes preparation and submittal of permit applications including qualification and quantification of point source and fugitive emissions, and evaluation of air pollution control technology options. He has extensive professional experience conducting indoor air quality assessments and making recommendations for improvements.

MICHAEL J. BURNS, PE  
Senior Project Manager

EDUCATION:

B.S. Mechanical Engineering, Northeastern University

CERTIFICATIONS / PROFESSIONAL CREDENTIALS:

Registered Professional Engineer – Massachusetts  
Certified Toxics Use Reduction Planner – General Practice

PROFESSIONAL MEMBERSHIPS:

American Society of Mechanical Engineers  
Toxics Use Reduction Planners Association

EXPERIENCE:

With more than 22 years of experience, Mr. Burns has dealt with a wide range of EHS issues ranging from environmental compliance reporting and auditing to industrial hygiene surveys and indoor air quality investigations. He has been applying his expertise at OCCUHEALTH for the last 15 years with much of his work in support of EHS compliance in the biotechnology and pharmaceutical industries.

Mr. Burns' experience includes health and safety risk assessments in the pharmaceutical research & development industry, occupational exposure banding (OEB), noise and industrial hygiene surveys and engineering verifications of containment equipment and engineering control systems.

He has developed a variety of facility-specific environmental management and compliance plans for industry and public utilities. These documents include: Massachusetts Toxics Use Reduction Act (TURA) Plans, Stormwater Pollution Prevention Plans, Spill Prevention Control and Countermeasure (SPCC) Plans, Environmental Protection Agency (EPA) TIER II Reports, EPA Form R Reports and TURA Form S reports.

Mr. Burns' work requires frequent interaction with all levels of personnel from plant operators and upper management to public officials and regulatory agencies.

Prior to joining OCCUHEALTH, Mr. Burns worked in the environmental field with a national consulting firm that specialized in indoor air quality investigations, industrial hygiene surveys, asbestos and lead management services, and environmental compliance in both the public and private sectors.

**BROCHURE**

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Phone (603) 212-9133 and Fax (603) 226-4108  
Email [tepp@teppllc.com](mailto:tepp@teppllc.com) and Web [www.teppllc.com](http://www.teppllc.com)

TEPP LLC provides a full range of effective transportation engineering, planning and policy services for its clients.

Since 1991, TEPP LLC has enjoyed many long-term relationships. Teams include various levels of government, land developers, institutions, civil/site engineers, architects, surveyors, attorneys and community organizations.

**SERVICES**

TEPP LLC services include:

- traffic operations studies and design for intersections, highways and corridors
- traffic i-mpact and access studies, permitting and testimony regarding land developments
- transportation peer review
- multi-modal transportation engineering, planning and policy
- parking studies and design
- newly evolved areas such as context sensitive solutions, design for all users and innovative intersections
- accident investigations, expert testimony and litigation support

**APPROACH**

TEPP LLC emphasizes:

- proactively assessing and understanding client and project needs
- communicating effectively
- responding rapidly and effectively
- seeking practical and at times creative solutions
- taking a multidisciplinary team approach while maintaining a focus on transportation



## ABOUT US

TEPP LLC has conducted hundreds of projects throughout New England. We bring experience from other regions of the country, and have complementary credentials and education such as:

- Professional Engineer licenses and Professional Traffic Operations Engineer certification
- degrees up to the doctorate
- continuing professional development
- affiliation with the Institute of Transportation Engineers, Transportation Research Board, American Society of Civil Engineers and Society of American Military Engineers



## REPRESENTATIVE PROJECTS

Spit Brook Road/East Dunstable Road	Nashua NH	Corridor Study
Massachusetts Route 38	Tewksbury MA	Signalized Intersection Design
Sixth Street/Sixth Street Connector	Dover NH	Signalized Intersection Design
Broken Ground School	Concord NH	Traffic Assessment
New Hampshire Route 25/3A	Plymouth NH	Signalized Intersection Design
Massachusetts Route 28	Brockton MA	Signalized Intersection Design
Great Plain Avenue	Wellesley MA	Bicycle Facility Planning and Design
Natick Center	Natick MA	Parking Study
Downtown Area	Everett MA	Parking Study
Babson College	Wellesley MA	Parking Study
Falmouth Hospital	Falmouth MA	Traffic Impact and Access Study Parking Study Cape Cod Commission
Wal-Mart Supercenter	Plymouth NH	Traffic Impact and Access Study
Thornwood mixed-use redevelopment	Dover NH	Traffic Impact and Access Study Road Improvements Design
St. Vincent Hospital redevelopment	Worcester MA	Traffic Impact Analysis
Huntington Common Elderly Residential	Kennebunk ME	Traffic Impact and Access Study
Hannaford Supermarkets	New Hampshire Massachusetts	Traffic Impact and Access Studies Driveway Permits Massachusetts Environmental Policy Act
Peer Review	Massachusetts	Franklin, Framingham, Greenfield, Hopedale, Methuen, Newton, Tewksbury, Weymouth, Wilmington and Wrentham
	New Hampshire	Allenstown, Alton, Auburn, Candia, Hooksett, Merrimack, Newmarket and Northwood

**RÉSUMÉ**

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**KIM ERIC HAZARVARTIAN, Ph.D., P.E., PTOE  
PRINCIPAL****EDUCATION**

- Bachelor of Science in Civil Engineering, University of Kansas
- Master of Science in Civil Engineering, University of Kansas
- Doctor of Philosophy, University of Massachusetts Amherst
- Courses, Northeastern University, Old Dominion University, Air Force Institute of Technology, University of Lowell

**CREDENTIALS**

- Professional Engineer, Maine, Massachusetts, New Hampshire, Vermont; other states available by reciprocity
- Certified Professional Traffic Operations Engineer

**AFFILIATIONS**

- Institute of Transportation Engineers, Fellow of the Institute, Past International Director, District One Past Chairman, New England Section Past President, New Hampshire Chapter Past President, District One and New England Section Distinguished Service Awards
- Transportation Research Board
- American Society of Civil Engineers
- Society of American Military Engineers
- Chi Epsilon National Civil Engineering Honor Society
- Sigma Xi Scientific Research Society

Hazarvartian is TEPP LLC Principal and has been active in transportation and civil engineering since 1981, with experience in many states and overseas. He specializes in transportation impacts of land developments, traffic operations, traffic safety, litigation support and expert testimony, with consulting, government-sector and academic experience. In addition to technical expertise, he brings extensive knowledge in procedures and policies of governmental permitting and approval of land developments and transportation improvements. Hazarvartian also has experience with military installations.

Hazarvartian's extensive teaching experience has been primarily at the college and professional level, on such topics as civil engineering, traffic and transportation engineering and planning and traffic impacts of development. Hazarvartian has published on a wide variety of transportation engineering topics including the preparation of traffic impact and access studies, trip generation and the use of computers in transportation engineering. His articles have appeared in publications of the Institute of Transportation Engineers, the American Society of Civil Engineers, and the Transportation Research Board.

**TRANSPORTATION IMPACTS OF LAND DEVELOPMENTS**

Transportation impacts of land developments include traffic impact and access studies, with municipal, regional or state review; state driveway and traffic control signal permits; and extensive process related to the Massachusetts Environmental Policy Act and Cape Cod Commission. Hazarvartian's representative projects as part of the developer team include:

Braemoor Woods Residential Development, Salem NH  
Richardi Reservoir Residential Development, Braintree MA  
Gillette Distribution Center, Devens MA  
USA Springs Water Bottling Plant, Nottingham NH  
Boston Sports Club, Wellesley MA  
Allston Center Mixed-Use Redevelopment, Boston MA  
CVS/Pharmacy, Londonderry NH  
Wellington Circle Plaza Redevelopment, Medford MA  
Huntington Common Senior Housing, Kennebunk ME  
Discount Supercenter, Plymouth NH  
Baker Mills Conversion, Boston MA  
Integrated Solid Waste Management Facility, Bourne MA  
Citizens Bank, NH Locations  
The Works Health and Fitness Center, Somersworth NH  
Shaw's Supermarket, North Conway NH

Babson College Various Projects, Wellesley/Needham MA  
Valvoline Instant Oil Change, NH and MA Locations  
Digital Federal Credit Union, Tyngsborough MA  
Wise Living Senior Housing Projects, Cape Cod MA  
The Home Depot, North Windham ME  
128 Marketplace Commercial Redevelopment, Reading MA  
Gasoline Station and Convenience Store, South Berwick ME  
Mill Run Place Mixed-Use Development, Groton MA  
Loudon Road/TJMaxx Shopping Center, Concord NH  
Southern New Hampshire Medical Center, Nashua NH  
St. Vincent Hospital Redevelopment, Worcester MA  
Veterinary Clinic, Dover NH  
Hannaford Supermarkets, NH and MA Locations  
Enterprise Park Mixed-Use Development, Marshfield MA  
Super Stop & Shop Supermarket, Brockton MA



TRANSPORTATION REVIEWS

Hazarvartian’s representative reviews of transportation impacts of land development or transportation initiatives, on behalf of municipalities or community organizations, include:

Pleasant Valley Street Residential Development, Methuen MA	Retail Center and Industrial Park, Rowley MA
Southern New Hampshire University, Hooksett NH	CVS/Pharmacy, Framingham MA
Whistle Stop Estates, Georgetown MA	Honey Dew Donuts, Wrentham MA
Ipswich Co-Operative Bank, Rowley MA	Regency Center Shopping Center, Merrimack NH
Cumberland Farms Gasoline Station and Convenience Store, Plaistow NH	Recreation Fields, Merrimack NH
Heartbreak Farm Residential Development, Ipswich MA	Hotel Expansion and Water Park, Merrimack NH
648 Old West Central Street Commercial Redevelopment, Franklin MA	Super Stop & Shop Supermarket, Newton MA
	Needham Street/Highland Avenue Corridor, Newton MA
	Live! Casino Massachusetts, Leominster MA
	840 East Street Residential Development, Tewksbury MA

PLANNING, STUDY AND DESIGN OF TRANSPORTATION FACILITIES

Hazarvartian has been involved with the planning, study and design of road systems, intersections and traffic control signals for motor vehicles, bicycles and pedestrians and has also been involved in other transportation modes. Examples follow.

Great Plain Avenue Bicycle Facility Study and Concept Plan, Wellesley MA	Main Street/Forest Street Intersection Railroad Preemption Traffic/Signal Design, Wakefield MA
Massachusetts Route 132 Corridor Simulation and Animation, Hyannis MA	Walkers Brook Drive/General Avenue Intersection Traffic/Signal Design, Reading MA
Sixth Street/Sixth Street Connector Intersection Traffic/Signal Design, Dover NH	Fort Leonard Wood MO, Major Planning and Design Study
Spit Brook Road and East Dunstable Road Corridor Study, Nashua NH	Hunter Army Airfield GA, Major Planning and Design Study
New Hampshire Route 9 Intersections Traffic/Signal Design, Concord NH	Misawa Air Base, Japan, Major Planning and Design Study
New Hampshire Route 25 Intersections Traffic/Signal Design, Plymouth NH	Patrick Air Force Base FL, Major Planning and Design Study
Massachusetts Route 28 Intersections Traffic/Signal Design, Brockton MA	Barksdale Air Force Base LA Airfield Pavement Repair, Full Design
	Dam Neck Naval Reservation VA, Gate-Area Operations Study
	K.I. Sawyer AFB MI, Gate-Area Design

PARKING STUDIES AND DESIGN

Parking studies include assessing parking demand and supply, with solutions such as the planning of new parking facilities or the reduction of demand through management. Representative projects follow.

Concord Family YMCA, Concord NH	Patrick Air Force Base FL
Babson College, Wellesley MA	Southern New Hampshire Medical Center, Nashua NH
Downtown Everett, Everett MA	Staples Shopping Center, Nashua NH
Natick Center, Natick MA	Burger King, Merrimack NH
Falmouth Hospital, Falmouth MA	Washington Street Developments, Wellesley MA
Cloverleaf Center Shopping Center, Natick MA	

LITIGATION SUPPORT AND EXPERT TESTIMONY

Hazarvartian’s litigation support and expert testimony has involved research, analysis, expert opinions and expert testimony related to accidents; traffic operations and safety; and appeals of municipal development approvals. Representative cases follow.

Airport Curbside Operations, Warwick RI	Hannaford Supermarket, Lowell MA
The Outlet Center Site Circulation, South Burlington VT	Groveland Fairways, Groveland MA
Intersection Design Safety, North Andover MA	Rite-Aid Pharmacy, Henniker NH
U.S. Route 7 Design, South Burlington VT	

## David W Fisher

978.996.5713 m | dfisher430@comcast.net

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### PROFESSIONAL REGISTRATION

Commonwealth of Massachusetts  
Registered Landscape Architect No. 937

### AFFILIATIONS

Director of Design, CC at Play, 2012-2017  
Former Chair, Concord Zoning Board of Appeals  
Member and Design Director, The Robbins House, Concord, MA

### SUMMARY OF QUALIFICATIONS

- Self motivated and organized professional, skilled in managing and leading “in-house” and consultant teams to achieve project goals.
- Clear communicator and team builder with strong commitment to mentoring others
- Dedicated team player, with creative problem solving skills at all organizational levels.
- Vision-oriented, committed to developing and maintaining excellent client relations.
- Fluent in MA Wetlands design, planting, construction

### PROFESSIONAL EXPERIENCE

Dec. 2011 to Present

Fisher Design Group, LLP., Concord, MA: Owner

- Providing Project Management for additions and renovations to numerous small to large scale residential landscape projects in the greater Boston metropolitan area.
- Providing design and construction documentation for commercial, day care, municipal, healthcare and senior living projects.
- Providing wetland permitting and construction review services.

1985 to 2011

Levi + Wong Design Associates, Inc., Concord, MA: Senior Associate/Project Manager  
Larson Associates, Inc., Arlington, MA: Project Manager  
Keyes Associates, Inc., Waltham, MA: Landscape Architectural Department Manager  
Akira Yamashita and Associates, Boston, MA: Landscape Architect/Urban Designer

Pre 1985

National Park Service, Golden, CO  
Office of Coastal Zone Management, Boston, MA  
Department of Environmental Management, Wetlands Restriction Program Boston, MA  
Department of Natural Resources, Concord, MA

### EDUCATION

Master of Landscape Architecture (MLA, 1985)  
The University of Michigan, Ann Arbor, Michigan  
Bachelor of Science, Environmental Design (BS, 1975)  
The University of Massachusetts, Amherst, MA

### RELATED SKILLS

Proficient in Microsoft Word, Microsoft Excel,  
Proficient in ArchiCAD (Graphisoft CAD)  
Knowledgeable in AutoCAD  
Proficient in Microsoft Power Point  
Experienced in contract review, project budgeting and tracking

# David Fisher, REGISTERED LANDSCAPE ARCHITECT

## REPRESENTATIVE LIST OF PROJECTS

### PUBLIC

- The Robbins House, Concord, MA (FDG)
  - Site Design for historic property, signage, outdoor improvements coordination with National Park Service
  - Building relocation planning and implementation
- Carlisle Honor Roll, Carlisle, MA (FDG)
  - Design and Construction Management for Honor Roll Monument on Historic Carlisle Town Common
- Boxborough Veteran's Memorial, Boxborough, MA (FDG)
  - Design and Construction Management for Veteran's Memorial Monument and Relocation of WW1 Boulder monument.
- Alcott Elementary School Outdoor Classroom, Concord, MA (FDG)
  - Design and Construction Management for Outdoor Classroom
- Robbins Memorial Town Hall, Arlington, MA (FDG)
  - Design Services for Interior Renovations to historic structure

### COMMERCIAL

- One Brookline Place, Brookline, MA (FDG)
  - Landscape renovation and ADA accessibility improvements at medical office building
- 788 Boston Post Road, Groton, MA (FDG)
  - Landscape renovation and ADA accessibility upgrades. ConTech drainage planting design.
  - New vestibules, ramps, stairs, plazas, lighting and plantings
- 460 Totten Pond Road, Waltham, MA (LWDA)
  - Landscape renovation and ADA accessibility upgrades
  - New vestibules, ramps, stairs, plazas, lighting and plantings
- Buildings 1800, 1900 and 2000, Westborough, MA (LWDA)
  - Landscape renovation and ADA accessibility upgrades
  - New vestibules, ramps, stairs, plazas, lighting and plantings

### HEALTHCARE AND SENIOR LIVING

- New England Rehabilitation Hospital, Woburn, MA (LWDA)
  - Design Services for Renovations to Inpatient Rehabilitation Wings
  - Design Services for Renovations to Entry Lobby Atrium (Study)
- Braintree Rehabilitation Hospital, Braintree, MA (LWDA)
  - Design Services for Renovations to Inpatient Rehabilitation Wings and Outpatient Clinic
- The Gables at Winchester, Winchester, MA (LWDA)
  - Design Services for extensive exterior renovations to patio spaces, parking
- Edgewood Retirement Community, North Andover, MA (LWDA)
  - Design Services for Addition to existing facility
- D'Youville Senior Care, Lowell, MA (LWDA)
  - Design Services for New Assisted Living Center and Hospice Facility
- Mary Anne Morse Nursing Home, Natick, MA (LWDA)
  - Design Services for New Assisted Living Facility
- Watertown Senior Center, Watertown, MA (FDG)
  - Design Services for New Construction

### URBAN DESIGN & MASTER PLANNING

- Hamaoka Golf Village, Shizuoka Prefecture, Japan (AYA)
  - Design study to develop 500 acres of hillside, wooded land for luxury condominiums, hotel and guest cottages, spa, conference facilities and two 18-hole golf courses.
- Marina Kawage, Mie Prefecture, Japan (AYA)
  - New marina and clubhouse development on what once was agricultural land (rice paddies). The clubhouse and marina was completed in 1993.
- WGBH Long-Range Master Plan, Cambridge, MA

**David W Fisher**

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2 of 3

## David Fisher, REGISTERED LANDSCAPE ARCHITECT

Charles River Upper Basin Master Plan, Cambridge & Boston, MA  
Logan Airport/Bird Island Flats, Tunnel Portal & Interchange Design, Boston, MA  
S. Boston/Third Harbor Tunnel, Tunnel Portal & Highway Design, Boston, MA  
Service/Admin. Complex-Third Harbor Tunnel, Design, Boston, MA  
Vent Buildings #6 & 7, Third Harbor Tunnel, Design, Boston, MA

### WETLAND RELATED

Concord Carlisle at Play, Concord, MA (FDG)  
Vice President, CC at Play, Director of Design. Directed 3 phase renovation/addition project including: 2 baseball fields, 2 softball fields, 6 tennis courts, synthetic turf field, multi-purpose field, lighting, irrigation at the Concord Carlisle Regional High School. Oversaw wetland design, construction and response to emergency flooding and repair.

Brookhaven at Lexington, Lexington, MA (FDG)  
Design Services for new 43 unit assisted living building and extensive exterior renovations to existing assisted living facility including patio spaces, green roof, accessible walkways, plantings, parking and circulation. Wetland plantings, stormwater basin plantings and construction administration.

Carleton Willard Village, Bedford, MA (FDG)  
Design Services for planting and buffering for Zoning Board of Appeals. Buffer planting and drainage area planting design and construction administration.

Residential Projects: Newton, Concord, Carlisle, Newton, Sudbury, Weston, Natick, Holliston  
Notice of Intent, RDA filings, presentations and construction services. Design Services for extensive exterior renovations including outdoor kitchens, patios, lighting, swimming pools, hot tubs, pergolas, etc.

### OTHER

Primrose at Natick Day Care Center, Natick, MA (FDG)  
Design Services for site planning and design services for new day care complex in Natick, MA including exterior landscape improvements including accessibility, parking, circulation, play areas and planting.

Joanne Langione Dance Center, Newton, MA (FDG)  
Design Services for extensive exterior landscape renovations including accessibility, parking, circulation.

### K-12 & HIGHER ED

University of Rhode Island, RI, Center for Coastal Studies, Coastal Design Institute  
Acton Boxborough Regional High School, Acton, MA  
Barnstable High School, Barnstable, MA  
Trotter Middle School, Town of Southborough, MA  
Chenery Middle School, Belmont, MA  
Trum Field, Somerville, MA  
West Taunton Athletic Complex, Taunton, MA  
Mansfield High School, Mansfield, MA  
Pembroke High School, Pembroke, MA

### PUBLICATIONS

Perceptual Landscape Evaluation: A Framework for Coastal Sand Dune "Protection and Land Use Control". April, 1985. Unpublished Masters Thesis, University of Michigan, Ann Arbor.

Preliminary Resource Assessment for Wilderness Study Areas Contained in H.R.-1214. U.S.D.I., N.P.S., Rocky Mountain Regional Office, 1984.

Long Range Capital Outlay Plan. Div. of Forests and Parks, Office of Planning and Program Dev. Dept. of Environmental Management, June, 1982.

Northeast Sector Swimming Study. Dept. of Environmental Management, May, 1981.

An Atlas of Coastal Resources, Volumes I & II. Office of Coastal Zone Management, June, 1977.

Open Space Plan, Town of Concord. Dept. of Natural Resources, Spring, 1977.

**David W Fisher**

978.996.5713 | dfisher@fisher-designgroup.com

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## 2023 FEE SCHEDULE

Principal PE/LSP	\$ 195/hour
Senior Project Manager Environmental/PG/LEP/LSP	\$ 175/hour
Senior Project Manager Environmental	\$ 170/hour
Engineering Operations Manager	\$ 170/hour
Senior Project Manager – Engineering	\$ 160/hour
Project Engineer/Scientist	\$ 145/hour
Senior Survey Technician	\$ 135/hour
Staff Engineer/Scientist	\$ 120/hour
Engineer/Scientist I	\$ 95/hour
CAD Drafter	\$ 90/hour
Environmental Technician	\$ 90/hour
Clerical	\$ 70/hour

### Services of Others

OHI will occasionally engage the specialized services of subconsultants and subcontractors to participate in a project. The cost of such services plus a 15% service charge shall be invoiced to the Client.

### Reimbursable Expenses

Reimbursable expenses will be invoiced to the Client at cost plus a 15% service charge.

### Equipment

Photoionization Detector	\$80/day	Plots - B&W	\$0.70/sf
Particle Counter/DustTrak	\$80/day	Plots – Color	\$3.00/sf
4-Gas Meter	\$80/day	Plots – Rendering	\$6.50/sf
Peristaltic Pump & Battery Pack	\$55/day	Presentation Board	\$12.00 each
Oil/Water Interface Probe	\$55/day	Copies – B&W Letter	\$0.15 each
Water Level Meter	\$40/day	Copies – B&W Ledger	\$0.35 each
Hammer Drill and Bits	\$225/day	Copies – Color Letter	\$0.35 each
Hand Auger	\$75/day	Copies – Color Ledger	\$0.70 each
Service Vehicle	\$150/day	Report Bindings – Letter	\$12.00 each
Field Filtration Materials	\$30/sample	Report Bindings – Ledger	\$16.00 each
Groundwater Sampling Materials	\$30/well	Large Format Digital Scan	\$11.00 each
Anemometer	\$80/day	Robotic Total Station	\$350/day
PPE (Level D)	\$55/day		
XRF Meter	\$3,000/week		

Note: We reserve the right to modify the Professional Fee Schedule at any time during the current year



**AKFCS Facilities Department:**

**Full rollout of the new CMMS System (Jira)**

The platform to support all IT, Facilities, and Janitorial requests were rolled out. The system is more user-friendly, allows the requester to interact with the assigned tech/team member, and also provides graphs and metrics to both Gabriel and I, so we can see where the need is greatest.

**Grants, bids, and notices:**

I have been working with Heidi, Alisha, and Michelle on an energy grant bid document, which will allow us to update the 42 ES fan coil units to be more energy efficient and allow us, in principle, to get these units onto an interface along with the boilers and chiller to allow for easier use and access to troubleshooting.

Ongoing work regarding a door safety/security grant. In principle, we are looking to move away from the keycode system and towards an encrypted keyfob system. This will mean upgrading the buffer zone entry doors and frames and placing keyfob systems on each entry door at HS, MS (inclusive of the buffer zone and BRM entry doors), and ES. We are also looking at upgrading the HS entry doors along with the ES entry doors.

Again, along with Heidi and Alisha's help have been creating a Cure Notice to send to our current Janitorial vendor, who is not meeting their obligation per their contract. I believe the Notice is in the hands of our Lawyer before it gets issued to the vendor.

**Upgrading of Vendors:**

Regarding Patrick's question in the November meeting, I have been looking at our vendors and how we can strengthen relationships or bring back vendors with historic site knowledge. We now have a preferred vendor for Electrical work, and they have the capacity and expertise to provide the level of service befitting our district.

I am looking to schedule a meeting with our old vendor for the HVAC systems.

Also, as a part of this, we are working towards streamlining our monitoring systems for Fire Suppression and Security systems. We currently utilize 3 companies/entities for overseeing those 2 systems. During the recent very cold snap, the monitoring system failed us. The WFD called to tear into us about not letting them know about a particular system that failed. During that conversation, it was relayed that they actually monitor that building and should have been letting us know about the system failure. They have corrected the protocols, and we shouldn't see this repeated.

We are currently working with 2 vendors to look at our options for the Elevator contracts and potentially upgrading equipment as needed.

**ES installation of Interior and Exterior security cameras:**

We have now completed the interior portion of the project. We are utilizing Renaud for the exterior part, and they should start and finish this during the February vacation week.

**ES Basement storm door installation:**

I will be meeting with Bluesky on 2/17/23 to go over the details of the installation of the doors during the February vacation week.

**Projects for February vacation week:**

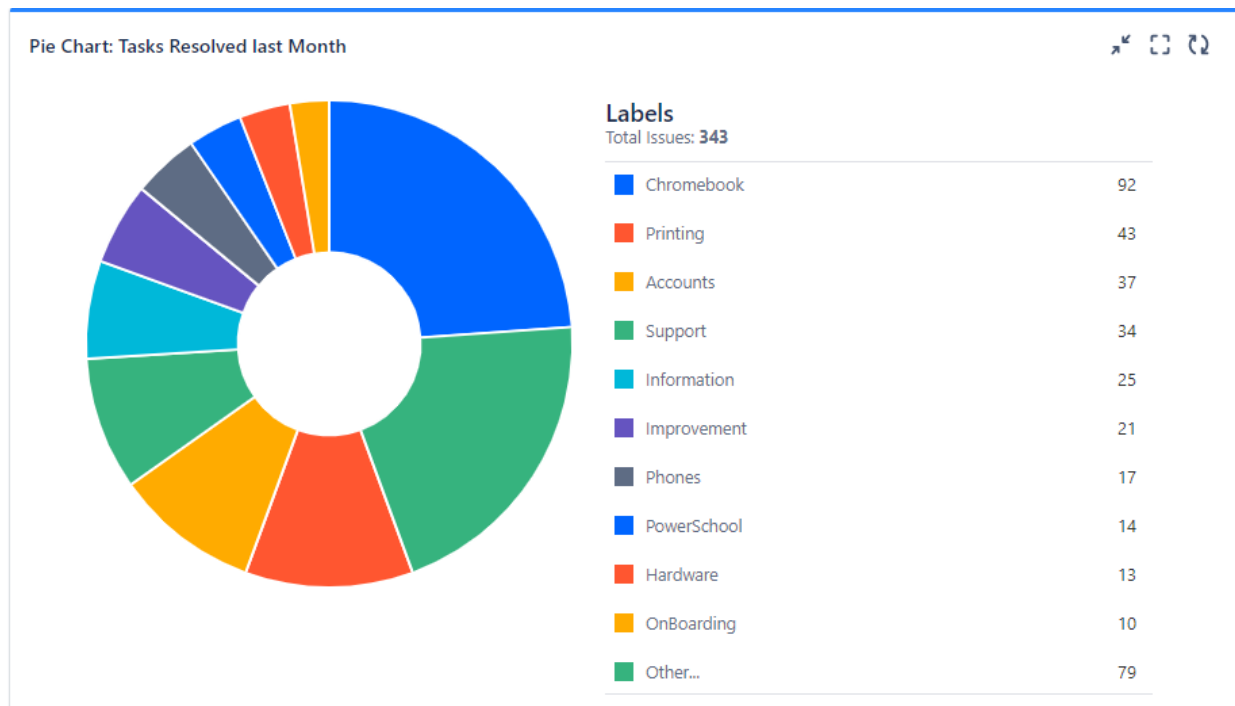
As well as the installation of the Storm Doors and Exterior Camera project at ES. We have upgraded the Activity Center doors and frames, front and rear entry. The installation of a Fire suppression system in the recently purchased freezers at Elementary schools. HVAC bid walks, trying to set up a meeting with O'Briens to discuss our playground at Elementary school.

**New Hires in the team:**

We welcomed Irma into our team on 2/06. Irma applied to be part of our Daytime custodian team, having previously worked at MS through our current Janitorial vendor. I also have an interview scheduled for another Maintenance tech for the day shift next week.

# IT Updates 2/2023

- Last Months more common Issues
  - 343 Resolved tasks (not including alerts)
  - Top 3 categories
    - Chromebooks (Break-fix)
    - Printing
    - Account related issues



- IT Projects
  - Powerschool Implementation
    - More Data Imports
      1. We have a working System!
      2. Data is limited but importing continues every week
    - Enrollment and Lottery Update
  - New Surveillance Camera Server Installation
  - Setup a new Storage System for Data redundancy and backup
  - IT Portal is Live
    - Facilities and IT requests can be done from this page
    - Increase visibility of our main issues, better planning, reports etc.
- A few examples of day to day work
  - IT Support

- Student Chromebook Inventory
- Replace chromebook Screen
- Change Projector bulb
- System Admin
  - Setup new network Jacks for Copier in ES Basement
  - Troubleshoot cameras and server issues
  - Upgraded fiber cables on HS Switches
- Database Admin
  - Populated and Student data for the new system
  - Met and lead SIS Implementation meetings
  - GPO policy edits related to Printers
- Teamwork
  - Firewall implementations to secure network
  - Improve monitoring systems and notifications
  - Improvements for our Surveillance systems
  - Implement processes and procedures



## Abby Kelley Foster Charter Public School

10 New Bond Street Worcester, MA 01606

Phone: (508) 854-8400 Fax: (508) 854-8484

www.akfcs.org

### Facilities and Finance Committee Meeting Minutes-DRAFT

Friday, February 17, 2023, 8:00 a.m.

<https://akfcs-org.zoom.us/j/92769937958?pwd=OFJSaHNTZnlhMzNaY3NkYnRIL3NTUT09>

**Meeting ID:** 927 6993 7958 **Passcode:** 134789

**By phone:** +1 929 205 6099 **Meeting ID:** 927 6993 7958

The meeting was called to order by Mr. Adam Beaudry. The attendance was recorded and is attached.

Mr. Beaudry asked the Committee to review the Meeting Minutes from the January 20, 2023

meeting. Upon its review, Mr. Beaudry requested a motion to approve the minutes from the January 20, 2023, Facilities & Finance meeting. Mr. Royce made the motion, and it was seconded by Ms. Blue.

### **CD/Investment Update**

All documentation has been pulled together and will go to Ms. Paluk and Mr. Royce for signature. Treasury funds and CDs are the options chosen with no money markets. \$5.5 million is the total amount being invested within the different investment options.

### **Long-Term Facilities Planning Proposal**

Consultant Bob Baldwin and his team, QPD LLC, have agreed to assist with planning the long-term facilities plans for Abby Kelley. QPD will provide strategic advisory services that guide AKF through defining and prioritizing its needs, identifying opportunities and constraints, identifying potential solutions for each market, evaluating the conceptual feasibility of solutions, assessing financial capacity, and outlining a prioritized development process. QPD will meet with AKF regularly, visit the site numerous times, and make a PowerPoint presentation to the Finance/Facilities Committee and the Board (in May or June).

### **WBDC/Abby Kelley Proposal Update**

OHI has agreed to assist with the details pertaining to the WBDC plans for the St. Gobain area. It was noted that the proposal was an estimate as this is a years-long project and should be budgeted for accordingly. Ms. Palul explained that she would meet with OHI to establish a timeline and work plan for this project.





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### **Facilities Report**

The new CMMS system has been rolled out to staff and is more user-friendly, allowing the requestor to interact with the assigned tech/team member. This system will also provide graphs and metrics, helping to determine where the need is the greatest. An energy grant bid document is being worked on, allowing for 42 elementary school coil fan units to be updated and be more energy efficient. Door safety is also being worked on to move away from the keycode system and into a key fob system. Work is also being done on strengthening vendor relationships and hiring vendors with the necessary expertise. Elevator vendor options are also being explored.

Elementary school interior and exterior cameras are in the works, with the interior cameras being completed. Renaud is being utilized for the exterior part and should have that completed during the February break. The basement doors will also be installed during the February break by BluSky. There are a few other projects that will take place during the February break, such as the installation of the fire suppression system and HVAC bid walks. The facilities team has also expanded with a new team member Irma as a daytime custodian.

### **IT Report**

Last month's more common issues with Chromebook fixes include replacing the Chromebook screen, printing issues, and account-related issues. PowerSchool implementation has also been taking place, with more imported data and a functioning system. While the data is limited, it continues to import new data weekly. A new storage system is being set up for data redundancy and backup. The IT portal is now live, assisting with the visibility of the main issues, reports, and better planning. Mr. Beltran also provided an overview of the day-to-day work for the IT department, such as student Chromebook inventory, upgrading fiber cables on the HS switches, and populating student data for the new system.

Mr. Beadury adjourned the meeting at 9:02 a.m.



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## Education Committee Meeting Agenda- DIGITAL MEETING

**Thursday, February 16, 2023, 8:00 a.m.**

**<https://akfcs-org.zoom.us/j/98647263514?pwd=MHZsNmNkRXFIZjZkdG5GejlQRXhFdz09>**

**Meeting ID: 986 4726 3514 Passcode: 946445**

**By phone: 98647263514 Meeting ID: 986 4726 3514**

- I. Call to Order- Ms. Amy Vernon, Chair
- II. Introductions/Attendance Recorded
- III. Review of the December 9, 2022, Meeting Minutes
  - a. Motion: To approve the December 9, 2022, Meeting Minutes
- IV. Charter Renewal- Ms. Heidi Paluk, Executive Director
- V. Fall SEL Data Presentation- Dr. Caroline Cole
- VI. Wellness Policy- Ms. Alisha Carpino
- VII. Principal Updates - Ms. Kelly Gould, Ms. Shelly Hinds, Mr. Christopher Kursonis
- VIII. Timely Topics as Identified by the Chair and/or ED
- IX. Upcoming Education Committee Meeting
  - a. Friday, March 10, 2023
  - b. Thursday, April 6, 2023
- X. Adjournment



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### Education Committee Meeting Minutes- DRAFT

Friday, December 9, 2022, 8:00 a.m.

<https://akfcs-org.zoom.us/j/99397896241?pwd=MGZmL1krRFpQV2N2UEthVmVMUTAvZz09>

**Meeting ID:** 993 9789 6241 **Passcode:** 004936

**By phone:** +19292056099 **Meeting ID:** 993 9789 6241

The meeting was called to order by Amy Vernon, Chair, at 8:02 a.m. The attendance was recorded and is attached.

Ms. Vernon noted minor edits for correction and requested a motion to approve the November 10, 2022, meeting minutes with corrections. The motion was made by Ms. Yarnie and seconded by Ms. Vernon. The minutes were approved unanimously.

### **Discipline Data Presentation**

The data presented by Mr. Kerr explained the different discipline measures taken at each school and provided an overview of the offenses. There were 43 students disciplined, as reported to DESE on June 22. Of those, 23 were one-time offenders, 14 had two violations, and 6 has three or more incidents. Mr. Kerr noted that fifty (50) percent of suspensions were due to physical altercations. When discipline issues were broken down school, the high school had twenty-two (22), the middle school had twelve (12), and the elementary school had nine (9). It was also explained that this was the trend of physical aggression was similar to what was seen across the state, as an eleven (11) percent increase was noted.

Mr. Kerr explained that all the data was broken down and compared to the state and Worcester. It was noted that Abby Kelley was below the state in every category. It was also explained that Abby Kelley was in the bottom  $\frac{1}{3}$  among all comparisons, including the state, Worcester, and other charter schools. A decrease in physical altercations was being seen as student communication increased.

Interventions and resources for suspended students and their families were discussed. Ms. Yarnie noted that issues in the home could be the reason for their actions and emphasized the need for behavioral health referrals. Proactive approaches were being taken with students to identify a problem before it started. Each case would be different, but it was explained that school counselors, behavior specialists, and clinicians all work together to address the issues at home.

The ability and reasons for out-of-school suspensions has recently changed in the state, making it difficult to suspend a student. Other measures must be attempted with the student before being able to suspend them; therefore, a drop in numbers was expected across the state. In-House suspensions were currently being



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done only in middle school, and it was explained that family support was one of the main driving forces behind this decision. Students would not have the support needed at home, and it was determined that it would be better to be in school to benefit from the time taken to reflect and grow from their decision.

### **Increasing Needs in Elementary School Students**

Ms. Gould spoke about the increasing number of behavioral and social-emotional needs in students and the increasing number of students on the autism spectrum, especially in Kindergarten.

Ms. Gould explained that due to the growing needs of the incoming new students, the elementary school is working to create programming to support those needs. Students have been placed in smaller classrooms with support as the team established programming to increase school readiness skills in identified classrooms, including behavioral supports. Many departments, including special education and counseling, will be in use more to address the students' high needs. The increasing mental health needs of students as young as kindergarten were also discussed, increasing the demands needed at the elementary school.

### **Enrollment Updates**

Three hundred and ninety (390) applications were currently submitted, with one-hundred and fifty (150) for kindergarten, fifty-five (55) for grade one, sixty-three (63) for grade two, twenty-six (26) for grade three, forty-one (41) for grade four, thirty-three (33) for grade five and twenty-two (22) for grade six. It was pointed out that there was a slight increase in waitlist declines as parents enrolled their children in other schools and parents hadn't wanted to withdraw them mid-year, not something we typically see.

### **Principal Updates**

### **Middle School**

The leadership committee, made up of grade six and seven students, collected toys for a toy drive and also hosted a bingo event with families that over ninety people attended. The Winter concerts for strings, band, and chorus would be taking place next week. Basketball and musical tryouts also took place for students. The first progress-monitoring round for MTSS was completed, and students were being evaluated for possible removal from interventions and placement back into the classroom. Formal observations for teachers were conducted as part of the evaluation process and to identify areas for professional development.



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### **High School**

Updates were provided on the different sports and tryouts taking place. It was noted that the football season was over, with the last game on Thanksgiving, and cheer tryouts took place. The high school concert was a great success; students would go to another MCAA Festival in March to perform.

### **Elementary School**

Ten students were able to participate in “Shop with a Cop,” where they were awarded \$250 to teach them about spending not only on themselves but also on the ones they care for. The students went to Target in police cruisers, and Target provided dinner to the student’s families. The first round of clubs ended, and students could participate in musicals and cooking classes. The book fair sold almost \$7,000 in books, and thanks was given to staff for their assistance.

Ms. Gould explained that sixteen percent (16%) of kindergarten students, fifteen percent (15%) of grade 1 students, thirty (30%) of grade 2, and twenty-three percent (23%) of grade 3 were in an intervention. It was noted that data was currently being evaluated to ensure that students were moved into proper groups and given appropriate interventions. It was also stated that report cards were being redesigned to facilitate a better understanding of them for parents and easier accessibility. Parent-teacher conferences saw an 89% attendance rate, and families could see how their students performed.

### **Timely Topics as Identified by the Chair and/or ED**

Ms. Paluk stated that the culture survey would go out to families and staff in the next few hours, and the data would be analyzed once received. Ms. Paluk also noted that she would draft a document with talking points that would allow Board members to be on the same page if asked to speak on the new charter school proposal.

Ms. Vernon called for a motion to adjourn the meeting. Ms. Zagabe-Ndiku made the motion, and Ms. Vernon seconded it. Roll call was taken, and the committee members voted unanimously to adjourn the meeting at 9:05 am.





## ABBY KELLEY FOSTER CHARTER PUBLIC SCHOOL

### SUMMARY OF REVIEW

Worcester, MA  
February 2023

**Massachusetts Department of Elementary and Secondary Education**  
75 Pleasant Street  
Malden, MA 02148  
Phone: (781) 338-3227  
Fax: (781) 338-3220



This document was prepared by the  
Massachusetts Department of Elementary and Secondary Education  
Jeffrey C. Riley  
Commissioner

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## ABOUT THE CHARTER SCHOOL RENEWAL PROCESS

The charter school regulations state that “the decision by the Board [of Elementary and Secondary Education] to renew a charter shall be based upon the presentation of affirmative evidence regarding the faithfulness of the school to the terms of its charter, including the extent to which the school has followed its recruitment and retention plan and has disseminated best practices in accordance with M.G.L. c. 71, § 89(dd); the success of the school's academic program; and the viability of the school as an organization” 603 CMR 1.11(2). Consistent with the regulations, recommendations regarding renewal are based upon the Department of Elementary and Secondary Education’s (Department) evaluation of the school’s performance in these areas. In its review, the Department has considered both the school’s absolute performance at the time of the application for renewal and the progress the school has made during the first four years of its charter. Performance is evaluated against both the [Massachusetts Charter School Performance Criteria](#) (Criteria) and the school’s Accountability Plan.

The charter renewal process begins when a charter school submits to the Department an Application for Renewal of a Public School Charter (Application for Renewal). After the Department has determined the Application for Renewal is complete, the Department works with the school to schedule a renewal inspection.

The renewal inspection provides the Department with current information about the school’s performance relative the Criteria. The Criteria outline expectations for charter school performance in three areas of accountability: faithfulness to charter, academic program success, and organizational viability. The length and scope of the renewal inspection varies depending on the school’s age, size, location, status (conditions or probation), and/or past performance. All renewal inspections collect evidence that is required for a renewal determination as outlined by G.L. c. 71, § 89(dd). Department staff may conduct the renewal inspection, or the Department may contract with an independent organization to conduct the renewal inspection. For more details about the renewal inspection, see the [Charter School Renewal Inspection Protocol](#).

The Summary of Review (SOR) summarizes the school’s performance over the five-year charter term, reflecting evidence compiled throughout the charter term from sources such as annual reports, site visit reports, and state assessment results. See *Appendix E: Sources of Evidence* for more details. The SOR incorporates descriptions of evidence gathered during the renewal inspection.<sup>1</sup> The renewal inspection team prepares these descriptions, and they are included in the gray shaded boxes in the body of the report.<sup>2</sup> The SOR highlights evidence for six Criteria aligned with the statutory requirements for charter renewal outlined by M.G.L. c. 71, § 89(dd): Criterion 1: Mission and Key Design Elements; Criterion 2: Access and Equity; Criterion 3: Compliance; Criterion 4: Dissemination; Criterion 5: Student Performance; and Criterion 9: Governance. The SOR also includes evidence related to other Criteria assessed during the renewal inspection.

<sup>1</sup> The renewal inspection for Abby Kelley Foster Charter Public School was conducted by SchoolWorks on September 14, 2022.

<sup>2</sup> Descriptions of evidence gathered during the renewal inspection constitute the renewal inspection report referenced in 603 CMR 1.11.

## SCHOOL OVERVIEW

### SCHOOL PROFILE

Abby Kelley Foster Charter Public School (AKFCPS)			
Type of Charter	Commonwealth	Location	Worcester
Regional or Non-Regional	Regional	Districts in Region	Auburn, Leicester, Millbury, Oxford, Shrewsbury, Sutton, West Boylston, Worcester, and Wachusett Regional
Year Opened	1998	Year(s) Renewed	2003, 2008, 2013, 2018
Maximum Enrollment	1,426	Current Enrollment	1,422 <sup>3</sup>
Chartered Grade Span	K-12	Current Grade Span	K-12
Students on Waitlist	603 <sup>4</sup>	Current Age of School	25
<b>Mission Statement:</b> The mission of the Abby Kelley Foster Charter Public School is to assist parents in their role as primary educators of their children by providing a classical liberal arts education grounded in the great works of Western Civilization and aimed at academic excellence, musical competence and character formation.			

### SCHOOL HISTORY

- Abby Kelley Foster Charter Public School (AKFCPS) received its charter and opened in 1998, serving 533 students in grades K through 5. The school added one grade each year, reaching the original chartered grade span during the 2006-07 school year.
- The school's board of trustees initially contracted with Advantage Schools, Inc. for its educational and organizational management. The school terminated its contract with the company in May 2001.
- In April 2006, the Board of Elementary and Secondary Education (Board) approved an amendment to increase the school's maximum enrollment from 1,176 to 1,426 students beginning in September 2007.
- In January 2022, the Board approved an amendment to add Wachusett Regional School District to the school's charter region and to remove Holden.
- The school's board of trustees oversees the executive director, who in turn oversees the director of finance and operations; the director of facilities; the director of government relations, special education, and enrollment; the director of technology; the principal for grades K through 3; the principal for grades 4 through 7; the principal for grades 8 through 12; the director of English as a second language; the director of guidance and counseling services; and the director of development. The director of government relations, special education, and

<sup>3</sup> This is the number as of October 1, 2022. Source: [Profiles](#)

<sup>4</sup> This is the number as of March 15, 2022, as reported in the [Massachusetts Charter School Waitlist Initial Report for 2022-23](#).

Abby Kelley Foster Charter Public School  
Summary of Review

enrollment oversees the special education team chair, the special education administrative assistants, and the special education teachers and staff. The principals at each level oversee the curriculum coordinators, the assistant principals, and the general education teachers and staff.

- In June 2020, the school's board of trustees appointed an interim executive director after the executive director resigned. The board appointed the interim executive director as executive director in February 2022.
- The school implements the International Baccalaureate (IB) Diploma Programme for students in grades 11 and 12.
- The school has three campuses: one serving grades K through 3, one serving grades 4 through 7, and one serving grades 8 through 12.
- The school received a Core Criteria Site Visit in 2021, during the school's 23rd year of operation.

DRAFT



## STUDENT DEMOGRAPHICS

Enrollment by Race/Ethnicity (2022-23) <sup>5</sup>	
Race/Ethnicity	Percentage of Student Body
African American	55.4
Asian	2.9
Hispanic	21.6
Native American	0.4
White	14.3
Native Hawaiian, Pacific Islander	0.1
Multi-Race, Non-Hispanic	5.3

Selected Populations (2022-23) <sup>6</sup>	
Title	Percentage of Student Body
First Language not English	68.0
English Language Learner	18.0
Low-income	58.9
Students with Disabilities	11.7
High Needs	70.7

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<sup>5</sup> Source: [Profiles](#)

<sup>6</sup> Source: [Profiles](#)

## EXECUTIVE SUMMARY OF SCHOOL PERFORMANCE

Massachusetts Charter School Performance Criteria		
Faithfulness to Charter		Rating <sup>7</sup>
<b>Criterion 1: Mission and Key Design Elements</b> <i>Throughout the charter term, AKFCPS has been faithful to its mission and has implemented its key design elements. AKFCPS reported that it met a majority of the goals in its Accountability Plan.</i>		● Meets
<b>Criterion 2: Access and Equity</b> <i>AKFCPS seeks to ensure access to the program and equity for all students eligible to attend the school. The school provides information to the public regarding non-discriminatory enrollment practices and the availability of special education and English learner education programs. The school provides translated materials in multiple languages, including the most prevalent languages in the district where the school is located. The school has been mostly successful in recruiting a demographically comparable population and has been successful in retaining students.</i> <i>During the charter term, the school's rates of in-school and out-of-school suspension were consistently at or below the third quartile for all comparison schools</i>		● Meets
<b>Criterion 3: Compliance</b> <i>AKFCPS is in compliance with program requirements as determined by the Tiered Focused Monitoring Review. AKFCPS is in compliance with regulations as determined by the Office of Civil Rights. AKFCPS is out of compliance with state statute regarding teacher qualifications.</i>		Not Rated <sup>8</sup>
<b>Criterion 4: Dissemination</b> <i>During the charter term, AKFCPS disseminated best practices to other public schools in its district and across the state.</i>		● Meets
Academic Program Success		
<b>Criterion 5: Student Performance<sup>9</sup></b>	2022 Accountability Percentile:	64
Organizational Viability		
<b>Criterion 9: Governance</b> <i>Throughout the charter term, members of the AKFCPS board have been active and involved in their roles as public agents, providing competent and appropriate governance and oversight of the school.</i>		● Meets

<sup>7</sup> Rating Key:

- **Exceeds:** The school fully and consistently meets the criterion and is a potential exemplar in this area.
- **Meets:** The school generally meets the criterion and/or minor concern(s) are noted.
- **Partially Meets:** The school meets some aspects of the criterion but not others and/or moderate concern(s) are noted.
- **Falls Far Below:** The school falls far below the criterion and/or significant concerns are noted.

<sup>8</sup> Due to the number of items required for a public school and charter school to be in compliance with state and federal regulations and guidance, the Department does not rate this category as a composite.

<sup>9</sup> Due to the COVID-19 pandemic, the Department has not implemented all aspects of the statewide accountability since 2019. The Department did not issue accountability determinations for the 2019-20 school year due to the cancellation of state assessments and school closures related to COVID-19. The Department also did not issue accountability determinations in 2021. In 2022, the Department produced some of the information associated with annual accountability determinations, including school accountability percentiles. Further information about 2022 data is found [here](#).

## FINDINGS

### FAITHFULNESS TO CHARTER

CRITERION 1: MISSION AND KEY DESIGN ELEMENTS	
The school is faithful to its mission, implements the key design elements outlined in its charter, and substantially meets its Accountability Plan goals.	● Meets

*Finding: Throughout the charter term, AKFCPS has been faithful to its mission and has implemented its key design elements.*

- The school's mission is "to assist parents in their role as primary educators of their children by providing a classical liberal arts education grounded in the great works of Western Civilization and aimed at academic excellence, musical competence, and character formation." During a visit in Year 23 and during the renewal inspection, team members found evidence of the school operating in a manner that is faithful to its mission. The school offers International Baccalaureate (IB) level coursework, implements a music curriculum, embeds character virtues in different aspects of school life, and engages families through regular communication and a wide variety of events. Evidence gathered and reviewed as part of the renewal inspection is described in further detail below.
- The school has four key design elements: academic excellence/International Baccalaureate Programme; musical competence; character formation; and parent involvement. During a visit in Year 23 and during the renewal inspection, team members found each of these being implemented with fidelity. In addition to offering IB level coursework, the school participates in a consortium of IB schools for the purpose of strengthening instructional practices; the school offers a music curriculum for all students in grades K through 12 and creates opportunities for students to engage in many music-based performances throughout the year; the school seeks to instill ten character virtues by integrating them in classes for students in grades K through 8 and by incorporating a community service requirement for students in grades 9 through 12; and the school engages with families by offering workshops and other events, including a back-to-school block party. Evidence gathered and reviewed as part of the renewal inspection is described in further detail below.

*Evidence gathered and reviewed as part of the renewal inspection:*

All school stakeholders share a common understanding of the school's mission as outlined in its charter.

- Board members, administrators who oversee multiple campuses, school administrators, and teachers consistently referred to four parts of the school's mission statement: academic excellence, musical competence, character development, and partnering with students' parents. Stakeholders provided specific examples of ways in which the school demonstrates commitment to the mission, including implementing the International Baccalaureate Programme (IB), providing students with opportunities to participate in musical performances, focusing on the whole child through attention to social-emotional learning,

and holding parent workshops and special events, such as a virtual breakfast for parents to celebrate students' accomplishments.

The school operates in a manner that is faithful to its mission and implements the key design elements (KDEs) outlined in its charter. In describing how the mission is realized in the operation of the school, stakeholders described aspects of all KDEs articulated in the school's Accountability Plan. Evidence of the school's implementation of each KDE is discussed below.

#### *Academic excellence/International Baccalaureate Programme (KDE 1)*

- The school's Application for Renewal describes and administrators who oversee multiple campuses reported that the school established the International Baccalaureate (IB) program as a primary means to foster academic excellence for students in grades 10 and 11. The Application for Renewal indicates that an average of 68 percent of juniors and seniors take at least one IB course. Administrators who oversee multiple campuses added that they have begun to focus on using the program to guide and support instruction throughout all grade levels, rather than just grades 10 and 11. Teachers described this expansion of the IB focus as well, adding that they structure their curriculum for all students so that it culminates in IB-level coursework.
- The school's Application for Renewal and 2021-22 Annual Report state and teachers reported that the school participates in a consortium of IB schools, the Guild of International Baccalaureate Schools (GIBS) of the Northeast, meeting four times per year with teachers from other schools that implement IB. Teachers stated that they visit each other's schools, work together on instructional planning, and meet to discuss best practices.

**Commented [AL1]:** Should say 11 and 12

**Commented [AL2]:** Should be 11 and 12

**Commented [AL3]:** Should be 11 and 12

#### *Musical competence (KDE 2)*

- The school's Application for Renewal outlines the requirements related to musical competence across all grades that the school serves. Specifically, students in kindergarten and grade 1 learn to be tuneful, beatful, and artful through the First Steps in Music curriculum. Students in grades 2 and 3 begin the development of musical structures and theory, learning about musical notation and applying what they learn. Students in grades 4 through 12 participate in a General Music and Ensemble Performance curriculum that supports students in engaging in musical activities that encourage creativity, critical thinking, and reflection, among other skills. Teachers also described the robust music program at the school, adding that many student assemblies are music-based, and that recently music teachers have partnered with social emotional learning teachers to create projects and posters for students that combine these two areas.
- The Application for Renewal indicates that musical performances are an integral piece of the school's music program. The application explains that performances provide every student with the opportunity to engage in the music making process. Board members and administrators who oversee multiple campuses noted that because of the COVID-19 pandemic, recent performances have been virtual. They stated that these virtual performances were encouraging for students and their families during the pandemic.

#### *Character formation (KDE 3)*

- The school's Application for Renewal lists ten character virtues: responsibility, honesty, respect, kindness, self-discipline, fairness, perseverance, friendship, trustworthiness, and

citizenship. Board members, administrators who oversee multiple campuses, school administrators, and teachers all referred to these virtues when describing the school's approach to character formation. The renewal inspection team observed the character virtues posted in classrooms and hallways throughout the school buildings. Administrators who oversee multiple campuses stated that the school wants the character virtues not to be just words that are posted on the walls, but that they expect students and staff to exemplify the virtues in the way they approach their work and interact with each other. School administrators and teachers echoed this sentiment and added that in grades 4 through 12, there is a monthly recognition of students who exemplify a chosen virtue, which aligns to the description provided around such recognition in the school's Application for Renewal. Administrators reported that students look forward to this recognition and receive incentives such as a dress-down day or a pizza party. Teachers added that this practice has just begun in grades K through 3 as well.

- The Application for Renewal states that character education is integrated into classes in grades K through 8, with specific books being used to introduce monthly character values. Teachers confirmed that instruction incorporates readings that focus on the virtues. The Application for Renewal indicates that in grades 9 through 12, the character education program focuses on community service and indicates that the school requires students to complete 50 hours of service to graduate. The school's 2021-22 Annual Report reiterates this requirement and indicates that the graduating class of 2022 succeeded in meeting it.

*Parent involvement (KDE 4)*

- The school's Application for Renewal indicates and board members and administrators who oversee multiple campuses reported that partnering with parents is a priority for the school. The Application for Renewal outlines and teachers described numerous activities that the school invites parents to attend, including back to school nights, parent teacher organization meetings, parent advisory council, literacy night, math night, IB information sessions, workshops on how best to support students, a cultural night hosted by the English as a second language (ESL) department, and parent/teacher meetings. Administrators who oversee multiple campuses, school administrators, and teachers stated that the school is hosting a back-to-school block party this year for the first time. Board members reported that the school regularly sends newsletters to parents and seeks to involve students' families in extracurricular sports activities.

*Finding: AKFCPS reported that it met a majority of the goals in its Accountability Plan.*

- AKFCPS's approved Accountability Plan sets goals for the school's current charter term and includes 6 objectives and 15 related measures. Charter schools endeavor to meet the Accountability Plan goals by the end of the charter term. AKFCPS reported that it met 12 out of 15 goals. The school reported that it met both goals related providing students with an excellent education by implementing the International Baccalaureate Programme. The school reported that it met all three goals related to providing teachers and staff with opportunities to engage in effective professional development. The school reported that it met both goals related to providing students with access to an excellent music program. The school reported that it did not meet any of the three goals related to supporting parents as partners in their child's education due to the COVID-19 pandemic. The school reported that it met both goals related to students modeling the school's character virtues. The school reported that it met all three goals

related to dissemination. Please see *Appendix A: Accountability Plan Performance* for more details.

CRITERION 2: ACCESS AND EQUITY	
The school ensures access and equity for all students eligible to attend the school.	● Meets

*Finding: AKFCPS seeks to ensure access to the program and equity for all students eligible to attend the school. The school provides information to the public regarding non-discriminatory enrollment practices and the availability of special education and English language education programs. The school provides translated materials in multiple languages, including the most prevalent languages in the district where the school is located.*

- The school has received approval from the Department for its Recruitment and Retention Plan for the 2022-23 school year. The 2022-23 Recruitment and Retention Plan includes enhanced strategies to recruit groups of students for which the school does not enroll a comparable population. A school's Recruitment and Retention Plan is required to include enhanced strategies to recruit and retain students if the school was not successful the prior year in recruiting and retaining a comparable population.
- The school provides sufficient information to the public regarding non-discriminatory enrollment practices and the availability of specialized programs and services at the school to meet the needs of students with disabilities and English learners. The school's website and application for admission include a non-discrimination statement and information about the availability of programs and services at the school to meet the needs of students with disabilities and English learners.
- The school provides translated materials for families whose first language is not English. The school is located in a district where at least ten percent of students are English learners. Spanish, Twi, and Vietnamese are the most prevalent<sup>10</sup> language(s) besides English. The school's website can be translated into multiple languages, including Spanish, Twi, and Vietnamese. The school provides the application for admission in multiple languages, including Spanish, Vietnamese, Arabic, Twi, and Portuguese.

*Finding: The school has been mostly successful in recruiting a demographically comparable<sup>11</sup> population and has been successful in retaining students.*

<sup>10</sup> According to 603 CMR 1.05, "A language shall be deemed a prevalent language if it is the primary language of 1% or more of the district's total enrollment."

<sup>11</sup> A school's enrollment of a particular group is determined to be comparable if the percentage is equal to or greater than the Comparison Index, a figure derived from data of students who reside within the charter school's sending district(s). The Comparison Index is explained in further detail [here](#). Please note that although comparisons between student group enrollment data for a charter school and data other public schools in a geographic area can provide some information regarding comparability of student populations, the data are presented for reference only and primarily to determine trends for the charter school itself and to guide further inquiry. The student group composition of a charter school is not required to be a mirror image of the schools in its sending districts and region. The Department urges caution in drawing any conclusions about schools and districts regarding comparability of student group populations based on aggregate statistics alone. Enrollment of students in traditional public schools differs significantly from enrollment of students in charter schools.



Abby Kelley Foster Charter Public School  
Summary of Review

- Enrollment of students with disabilities was below narrowing targets<sup>12</sup> in 2019 through 2022.
- Enrollment of English learners was above gap narrowing targets in 2019 and 2020 and above the Comparison Index in 2021 and 2022.
- Enrollment of students in the low-income group<sup>13</sup> was above the Comparison Index in 2019 through 2022.
- Attrition rates<sup>14</sup> were consistently below the third quartile for all students and for students in the high needs group in 2019 through 2022.
- Stability rates<sup>15</sup> were consistently above the first quartile in 2019 through 2021 for all students and for students in the high needs group.
- Please see the [Charter Analysis and Review Tool \(CHART\)](#) and [Profiles](#) for more information.

In the tables below, percentages that meet Department expectations are highlighted in green, while percentages that do not meet Department expectations are highlighted in red.<sup>16</sup>

*Recruitment*

Students with Disabilities (Percent Enrolled)				
	2019	2020	2021	2022
AKFCPS	12.0	12.3	12.1	13.3
Comparison Index	13.2	14.0	14.0	14.3
Gap Narrowing Target	13.1	13.3	13.5	14.0

English Language Learners (Percent Enrolled)				
	2019	2020	2021	2022
AKFCPS	9.9	11.0	13.7	15.5
Comparison Index	15.8	15.3	13.5	13.6
Gap Narrowing Target	9.6	10.6	11.6	12.6

<sup>12</sup> Gap narrowing targets are provided for schools where enrollment is below the Comparison Index. Gap narrowing targets are explained in further detail [here](#).

<sup>13</sup> In 2021, the Department changed the criteria for identifying students in the economically disadvantaged student group and renamed the student group as low-income. The new criteria are explained in further detail [here](#).

<sup>14</sup> Attrition rates are the percentage of attrition from the end of one school year to the beginning of the next school year.

<sup>15</sup> Stability rates measure how many students remain in a school throughout the school year.

<sup>16</sup> With respect to recruitment, percentages at or above the Comparison Index or gap narrowing target are highlighted in green; those below the gap narrowing target are highlighted in red. With respect to attrition, percentages at or below the third quartile are highlighted in green; those above the third quartile are highlighted in red. The third quartile is the middle number between the median and the highest number for all comparison schools. With respect to stability, percentages at or above the first quartile are highlighted in green; those below the first quartile are highlighted in red. The first quartile is the middle number between the smallest number and the median of all comparison schools. Comparison schools include all of the public schools in the charter school's district or region (if the school is a regional school) that serve at least one grade level of students that overlaps with the grade levels served by the charter school.

Abby Kelley Foster Charter Public School  
Summary of Review

Economically Disadvantaged (2018-2021)/ Low-Income (2022) (Percent Enrolled)				
	2019	2020	2021	2022
AKFCPS	37.7	38.7	48.0	68.9
Comparison Index	36.5	37.5	39.2	47.3
Gap Narrowing Target	33.4	34.1	34.8	40.3

Retention

All Students (Percent Attrition)				
	2019	2020	2021	2022
AKFCPS	4.0	4.9	4.0	5.8
Median	8.2	7.3	7.9	10.2
Third Quartile	14.2	14.5	9.6	17.4

High Needs (Percent Attrition)				
	2019	2020	2021	2022
AKFCPS	3.0	4.1	3.4	5.8
Median	9.6	9.9	7.6	11.4
Third Quartile	13.8	13.9	9.5	17.6

All Students (Stability Rate Percentage)			
	2019	2020	2021
AKFCPS	97.1	95.8	97.4
Median	93.8	94.6	94.9
First Quartile	88.8	91.8	93.3

High Needs (Stability Rate Percentage)			
	2019	2020	2021
AKFCPS	96.5	95.4	97.5
Median	91.3	93.0	94.2
First Quartile	87.1	89.6	92.7

*Finding: During the charter term, the school's rates of in-school and out-of-school suspension were consistently at or below the third quartile for all comparison schools.*

Abby Kelley Foster Charter Public School  
Summary of Review

In the tables below, percentages that meet Department expectations are highlighted in green, while percentages that do not meet Department expectations are highlighted in red.<sup>17</sup>

Please note that median and third quartile figures are not yet available for 2022.

In-School Suspension (Percentage)				
	2019	2020	2021	2022
AKFCPS	0.2	0.3	0.0	0.4
Median	0.4	0.0	0.0	-
Third Quartile	1.8	0.6	0.0	-

Out-of-School Suspension (Percentage)				
	2019	2020	2021	2022
AKFCPS	2.4	1.7	0.0	2.8
Median	1.2	0.0	0.0	-
Third Quartile	3.7	2.3	0.0	-

Discipline rates for student groups that are higher than the discipline rate for all students are highlighted in red in the table below.

2021-22 Student Discipline Data Report <sup>1819</sup>					
Student Group	Students	Students Disciplined	Percent In-School Suspension	Percent Out-of-School Suspension	Percent Emergency Removal
All Students	1,447	43	0.4	2.8	0.0
English Learner	230	4			
Low Income	1,021	32	0.5	2.8	0.0
Students with Disabilities	209	11	1.4	4.8	0.0
High Needs	1,142	35	0.5	2.8	0.0
Female	774	15	0.1	1.8	0.0

<sup>17</sup> Percentages at or below the third quartile are highlighted in green; those above the third quartile are highlighted in red. The third quartile is the middle number between the median and the highest number for all comparison schools. Comparison schools include all of the public schools in the charter school's district or region (if the school is a regional school) that serve at least one grade level of students that overlaps with the grade levels served by the charter school.

<sup>18</sup> Source: [Profiles](#)

<sup>19</sup> Data in this report are suppressed (cells are blank) for a variety of reasons. More information about the data may be found [here](#).

Abby Kelley Foster Charter Public School  
Summary of Review

Male	673	28	0.7	3.9	0.0
American Indian or Alaska Native	5				
Asian	45	0			
African American/Black	788	20	0.3	2.5	0.0
Hispanic/Latino	299	15	1.0	4.3	0.0
Multi-race, Non-Hispanic/Latino	79	3			
Native Hawaiian or Pacific Islander	1				
White	230	5			

CRITERION 3: COMPLIANCE	
The school operates in compliance with the terms of its charter and applicable federal and state laws and regulations regarding public charter schools.	Not Rated <sup>20</sup>

*Finding: AKFCPS is in compliance with program requirements as determined by the Tiered Focused Monitoring (TFM) Review.*

- The Department's Office of Public School Monitoring conducted a [Tier 1 TFM review at AKFCPS in March 2021](#). Tier 1 reviews are conducted at schools where data points indicate no concerns with compliance and performance outcomes. The outcome of the visit was zero findings in special education and civil rights.
- The Department's Office of Language Acquisition conducted a [Continuous Improvement and Monitoring Plan \(CIMP\) mid-cycle review at AKFCPS in March 2021](#). The purpose of the visit was to follow up on findings in ELE identified during an earlier visit in 2014. The outcome of the visit was zero findings in English learner education.

*Finding: AKFCPS is in compliance with regulations as determined by the Office of Civil Rights.*

- The [Office of Civil Rights \(OCR\)](#) at the U.S. Department of Education investigated a complaint regarding disability discrimination at the school. In February 2018, the OCR found the school's website to be out of compliance under Section 504 and Title II because it was inaccessible to people with certain disabilities. AKFCPS took steps set out in two resolution agreements (February and April 2018) to resolve the issues and school met the requirements outlined in the agreements by February 2019.

*Finding: AKFCS is out of compliance with state statute regarding teacher qualifications.*

<sup>20</sup> Due to the number of items required for a public school and charter school to be in compliance with state and federal regulations and guidance, the Department does not rate this category as a composite.

Abby Kelley Foster Charter Public School  
Summary of Review

- Per state statute (Acts of 2002, c. 218, § 24), English as a second language (ESL) instruction must be delivered by a licensed ESL teacher. As of the date of the renewal inspection, 1 (out of a total of 6) teachers providing ESL instruction to English learners did not have an ESL license.

CRITERION 4: DISSEMINATION	
The school provides innovative models for replication and best practices to other public schools in the district where the charter school is located.	● Meets

*Finding: During the charter term, AKFCPS disseminated best practices to other public schools in its district and across the state.*

The school's Application for Renewal and annual reports from the charter term indicate that AKFCPS engaged in a variety of dissemination activities during the charter term.

- Throughout the charter term, the school hosted professional development sessions for the Guild of International Baccalaureate Schools and shared best practices on implementing the IB curriculum.
- In 2018 through 2021, the school disseminated best practices related to supporting diverse learners through the Response to Intervention model with school administrators from central Massachusetts.
- In 2018 through 2021, the elementary school principal met monthly with the principal of the Nelson Place School in Worcester. The school shared best practices for coordinating student support programming and special education services.
- In 2018-19, the school presented at the Department's Dissemination Fair to schools across the state about best practices for encouraging attendance and improving MCAS performance.
- In 2019-20, the school's music director co-taught a summer course at Boston University called Empowering Songs: Social Justice Through Music and Art.
- In 2020-21, the school shared best practices related to family engagement with Medford Public Schools and Southeastern Regional Vocational-Technical Schools.

## ACADEMIC PROGRAM SUCCESS

CRITERION 5: STUDENT PERFORMANCE <sup>21</sup>		
The school consistently makes progress in student academic achievement for all students as defined by the statewide accountability system.	2022 Accountability Percentile:	64

<sup>21</sup> Due to the COVID-19 pandemic, the Department has not implemented all aspects of the statewide accountability since 2019. The Department did not issue accountability determinations for the 2019-20 school year due to the cancellation of state assessments and school closures related to COVID-19. The Department also did not issue accountability determinations in 2021. In 2022, the Department produced some of the information associated with annual accountability determinations, including school accountability percentiles. Further information about 2022 data is found [here](#).

Abby Kelley Foster Charter Public School  
Summary of Review

The purpose of the statewide accountability system is to provide clear, actionable information about school performance. The accountability indicators used for each school depend on the grades served. Following is summary information for AKFCPS for 2019 through 2022, the first four years of the charter term. More detailed information related to student performance is included in [Profiles](#).

*Overall Classification*

Through 2019, Massachusetts districts and schools with sufficient data were classified into one of two accountability categories: districts and schools requiring assistance or intervention, and districts and schools not requiring assistance or intervention. In 2022, the Department did not publish determinations of each district's and school's need for assistance or intervention. This aspect of the traditional state accountability system will be reconsidered for future accountability reporting cycles.

Overall Classification
2019
<b>Not requiring assistance or intervention:</b> Substantial progress toward targets <b>Cumulative Progress Toward Improvement Targets:</b> 68%

*Accountability Percentile*

An accountability percentile between 1 and 99 is reported for most schools. This number is an indication of the school's overall performance relative to other schools that administer similar assessments, and is calculated using up to two years of data for all accountability indicators.

Accountability Percentile	
2019	2022
75	64

*Next-Generation MCAS Tests*

Next-Generation MCAS tests were given in English language arts and mathematics in grades 3 through 8 starting in 2017. Starting in 2019, Next-Generation MCAS tests were also given in science in grades 5 and 8 and in English language arts and mathematics in grade 10. Starting in 2022, Next-Generation MCAS tests were given in science<sup>22</sup> in high school.<sup>23</sup> Scaled scores for all Next-Generation MCAS tests range from 440 to 560. Students meet expectations in the scaled score range of 500 to 529 and exceed expectations in the scaled score range of 530 to 560.

<sup>22</sup> Further information about the transition to Next-Generation MCAS tests in science and technology/engineering may be found [here](#).

<sup>23</sup> Grade 10 science and technology/engineering (STE) results are reported based on students' best performance on any STE test taken in grade 9 or grade 10; only students continuously enrolled in the state, district, or school from fall of grade 9 through spring of grade 10 are included in state, district, or school results.



Abby Kelley Foster Charter Public School  
Summary of Review

Next-Generation MCAS Tests								
Grade and Subject	2019				2022			
	Percent of Students Meeting or Exceeding Expectations		Avg. Scaled Score		Percent of Students Meeting or Exceeding Expectations		Avg. Scaled Score	
	School	State	School	State	School	State	School	State
Grades 3-8 English Language Arts	49	52	499.4	501.2	34	41	490	494
Grades 3-8 Mathematics	40	49	495.9	499.2	24	39	486	493
Grades 5 & 8 Science and Tech/Eng	34	48	492.6	498.6	28	42	488	495
Grade 10 English Language Arts	65	61	507.5	506.2	61	58	505	503
Grade 10 Mathematics	52	59	505.2	505.1	42	50	499	501
Grade 10 Science and Tech/Eng					58	47	505	499

*Composite Performance Index*

The Composite Performance Index (CPI) is a 100-point index that serves as a measure of the extent to which all students are progressing toward proficiency. When all students score Proficient or Advanced on the legacy MCAS assessment, the CPI is 100. The legacy MCAS assessment is being phased out, and CPI is reported only for science in grade 10.

Composite Performance Index				
Grade and Subject	2019		2022	
	School	State	School	State
Grade 10 Science	95.8	89.1	89.5	83.0

*Student Growth Percentile*

The Department uses Student Growth Percentiles (SGPs) to measure how a group of students' achievement has grown or changed over time. SGPs are reported separately for ELA and mathematics. SGPs are generated based on student performance on statewide assessments. In general, SGPs in the range of 1 to 39 are associated with lower growth, SGPs in the range of 40 to 60 are associated with typical growth, and SGPs in the range of 61 to 99 are associated with higher growth.

Student Growth Percentile		
Grade and Subject	Next-Generation MCAS	
	Average SGP	
	2019	2022
Grades 3-8 English Language Arts	51.4	49
Grades 3-8 Mathematics	51.3	50
Grade 10 English Language Arts	55.0	58
Grade 10 Mathematics	70.1	48

#### Graduation and Dropout Rates

The 4-year graduation rate is the percentage of students in an annual cohort who graduate with a regular high school diploma within four years.

4-Year Graduation Rate (Percent Graduated)			
	2019 cohort	2020 cohort	2021 cohort
AKFCPS	97.6	95.4	98.8
Statewide	88.0	89.0	89.8

The 5-year graduation rate is the percentage of students in an annual cohort who graduate with a regular high school diploma within five years. Data for the 2020 cohort is the most recent available because it includes students in that cohort who graduated as late as 2021.

5-Year Graduation Rate (Percent Graduated)		
	2019 cohort	2020 cohort
AKFCPS	97.6	96.6
Statewide	90.1	91.0

Dropout rates are reported for high school students who drop out of high school.

Dropout Rate (Percent Dropout)			
	2019	2020	2021
AKFCPS	0.3	0.3	0.0
Statewide	1.8	1.6	1.5

**CRITERION 6: PROGRAM DELIVERY**

The school delivers a high quality academic program that meets the needs of all students.

**Key Indicator 6.2: Instruction**

The school staff has a common understanding of high-quality instruction. Instructional practices are aligned to this common understanding. Instructional practices are based on high expectations for all students and reflect cultural proficiency. Instruction fosters student engagement. Classroom environments are conducive to learning.

*Evidence gathered and reviewed as part of the renewal inspection.<sup>24</sup>*

Most observed instruction reflected high expectations for students.

- Team members observed instruction that reflected high expectations in 27 out of 32 classrooms. In these classrooms, teachers clearly communicated high standards for student work and reinforced the expectation that students can meet high standards through effective effort. For example, in one classroom, students were not allowed to opt out of instruction; each student had to share their work with the class. In another classroom, the teacher required students to use academic language to describe a model being used for the lesson. In yet another classroom, the teacher circulated around the room as students worked on an assignment, giving specific feedback to students on their work and asking students to explain their approach to the activity. Finally, in one classroom, as students discussed their understanding of a text, the teacher required them to cite evidence from the text to support their thinking.
- Team members observed instruction that did not reflect high expectations in 5 out of 32 classrooms. In these classrooms, teachers demonstrated basic academic expectations but enforced them inconsistently (e.g., teachers did not hold all students to the expectations) or ineffectively (e.g., teachers did not hold students to high standards for work). For example, in several of these classrooms, the teacher did almost all the talking, and many students did not attend to the instruction or engage in the lesson activity.

Most observed classroom environments were conducive to learning.

- Team members observed classroom environments that were conducive to learning in 28 out of 32 classrooms. These classrooms provided a safe physical and intellectual environment and allowed students to communicate and develop relationships with both teachers and peers. For example, in one classroom, the team observed evidence of positive relationships between students and the teacher, noting respectful, kind, and warm interactions. In another classroom, the teacher demonstrated respect for students by asking permission before examining each student's work. In all of these classrooms, there were clear procedures for learning activities and for transitions between activities. For example, in one classroom, students were instructed to put away materials using a verbal countdown, and students were able to transition into the next part of the lesson within one minute. Finally, teachers in these

<sup>24</sup> The renewal inspection team gathered evidence related to a subset of the elements included in *Key Indicator 6.2: Instruction*.

classrooms employed positive narration to reinforce appropriate academic behaviors (e.g., “I love how [student name] is already reviewing the problem and noticing the key words.”).

- Team members observed classroom environments that were not conducive to learning in 4 out of 32 classrooms. In these classrooms, the learning environment was not a safe intellectual environment where students were supported in taking academic risks, and behaviors that interfere with learning were not prevented. For instance, in one classroom, the teacher called on a student to respond to a question; the student said they did not know the answer, but the teacher kept repeating the question until the student finally mumbled an (incorrect) answer, then put their face in their hands for the next several minutes. In another classroom, students chatted with each other frequently while the teacher was trying to deliver the lesson; the teacher had to stop instruction multiple times to try to redirect students’ behavior but was unable to gain their attention.

The renewal inspection team observed some examples of instructional practices reflecting cultural proficiency.

- Prior to the renewal inspection, school administrators indicated that team members should see examples of the following instructional practices that the school believes reflect cultural proficiency: respectful interactions and relationship-building on an individual level, equity of student voice (i.e., all students included in the lesson), students working with diverse partners, and integration of students’ cultures, experiences, and interests into lessons. During the renewal inspection, school administrators added that while the curriculum currently includes a great deal of material focusing on Western civilization, the school is making attempts to diversify curriculum materials by adding more global, non-Western resources. Administrators who oversee multiple campuses added that the school’s focus on the whole child, particularly through their student support model, pushes school administrators, teachers, and other staff to consider individual student needs.
- During the renewal inspection, teachers reported that they seek to have instruction reflect cultural proficiency in several ways. For example, teachers indicated that they use a variety of texts during instruction that reflect the cultural diversity of their students, emphasizing that their aim is to ensure that students can see their own experiences represented every day. Teachers stated that they are mindful of cultural proficiency in the way they approach their interactions with students throughout the day (e.g., greeting students in the hallways, asking about and using the name that students prefer, clarifying the pronoun that each student identifies with, etc.).
- During classroom observations, the renewal inspection team observed mostly respectful interactions between staff and students and among students. For example, in one classroom, the teacher leaned close to a student to ask how the student’s brother was feeling. In another classroom, the teacher verbally reminded the class of the expectation that as they work in their small groups, they need accept the contributions and work of their peers in the group. The renewal inspection team observed a few instances when students were asked to bring their own experiences to bear during the lesson. For instance, in one classroom students shared their own life experiences in relation to the lesson topic. The renewal inspection team did not observe students discussing or commenting on the importance of working with people of diverse backgrounds or incorporating perspectives from a variety of experiences.

**Key Indicator 6.4: Supports for All Learners**

The school has a proactive system to effectively identify and address all students' strengths and needs for academic, behavioral, and social-emotional development through a tiered support model. Data and progress monitoring are used to ensure that all students across all subgroups have equal access and equitable support, interventions, and resources to achieve, grow, and advance. The school regularly uses data to evaluate and modify its support programming to ensure student success.

*Evidence gathered and reviewed as part of the renewal inspection:*

The school has a proactive, data-based system to effectively identify students' strengths and needs for academic, behavioral, and social-emotional development.

- According to a written description of the system of supports for all learners provided by the school, i-Ready is administered three times per year as a universal academic screener in reading and mathematics in grades K, 1, 2, 3, 4, 5, 6, 7, and 8. In addition, classroom-based quizzes, tests, and projects are also used as universal screeners. Administrators who oversee multiple campuses, school administrators, and teachers confirmed the use of these assessments, adding that students in K, 1, 2, 3, 4, and 5 also complete DIBELS assessments to measure reading progress and students in grades K, 1, and 2 complete other phonics screeners. School administrators reported that the school does not administer universal academic screeners to students in grades 9 through 12 but that staff review academic, behavior, and attendance data monthly.
- Administrators who oversee multiple campuses, school administrators, and teachers reported that the school uses a social-emotional survey three times per year through the Panorama platform to measure students' skills and current state in areas such as self-management, growth mindset, and emotional regulation. They indicated that teachers complete this survey as an observational screener for students in grades K, 1, and 2, while students in grades 3, 4, 5, 6, 7, 8, 9, 10, 11, and 12 complete the survey on their own. Administrators who oversee multiple campuses added that the school also uses teacher observations and student referrals to assess students' social-emotional and behavioral strengths and needs and to monitor students' progress in these areas over time.

The school implements a tiered support model that addresses the strengths and needs of all students.

- The written description of the system of supports for all learners provided by the school lists several Tier 1 academic supports are provided to all students. The document describes a staffing structure that includes reading and mathematics intervention teachers, a reading specialist, a mathematics coach, and technology support staff who provide support to all students. Administrators who oversee multiple campuses, school administrators, and teachers referred to staff members in these positions, and described a support block built into the schedule for all students ("What I Need" or WIN block), during which students can receive academic or social-emotional support. For example, social-emotional skills are taught during this time using research-based programs for students in grades K through 8 (Responsive Classroom and Second Step). School administrators and teachers named additional in-class supports, including differentiation techniques, modeling of content-area reading strategies, and utilization of multiple learning modalities and instructional tools.

- Administrators who oversee multiple campuses and teachers reported, and a review of the school's District Curriculum Accommodation Plan (DCAP) confirmed, that the school employs a multi-tiered system of support (MTSS) process to identify and monitor students potentially in need of Tier 2 and Tier 3 academic and behavioral or social-emotional interventions. Administrators who oversee multiple campuses explained that the process centers on four diagnostic cycles per year, beginning toward the end of September, in which a team of teachers, counselors, and interventionists discuss students who may need additional academic, social-emotional, or behavioral supports. Administrators who oversee multiple campuses and teachers stated that these meetings are facilitated by assistant principals or curriculum coordinators, and that they review data such as i-Ready scores, classroom assessments, and teachers' anecdotal observations and then determine specific interventions. Administrators who oversee multiple campuses and teachers added that these interventions are implemented, usually by teachers or support staff, and progress is monitored by the team between the diagnostic cycles, in roughly four-to-six-week periods.
- Several Tier 2 and Tier 3 interventions were outlined in the written description of the system of supports for all learners provided by the school and were described by administrators who oversee multiple campuses, school administrators, and teachers. Tier 2 academic supports include small group and pull-out instruction conducted by reading and mathematics specialists for students in grades K through 5; i-Ready online reading support, IXL intervention support in reading and mathematics, and the Just Words for English language arts intervention for students in grades 6 through 8. Tier 2 social-emotional and behavioral supports include group counseling around topics such as social skills, relationships, and social awareness; lunch bunch; check-in/check-out; and individual counseling. Administrators who oversee multiple campuses described Tier 3 interventions for reading, such as Wilson Reading and the Orton-Gillingham program, as well as after-school tutoring. Administrators who oversee multiple campuses added that to provide Tier 3 social-emotional and behavioral interventions, the school employs a licensed mental health counselor who specializes in trauma-informed counseling and sometimes connects students and families to a local non-profit mental health service provider.
- Team members observed teachers in 24 out of 32 classrooms implementing instructional practices to meet the academic needs of all students. In these classrooms, teachers provided instructional tools such as graphic organizers and manipulatives to support student learning. For example, in one classroom, students worked on individual laptops and the teacher posted visual models of the assignment. In several classrooms, teachers employed multiple instructional formats such as whole group and small group instruction, turn-and-talk activities, and independent work time. In other classrooms, teachers modeled expectations for lesson activities, then circulated among students to provide support in meeting those expectations. In classrooms where instructional practices did not meet the academic needs of all students, teachers did not adapt instructional strategies or provide instructional supports to help students meet learning objectives. For instance, in one classroom, the lesson consisted solely of whole group, teacher-led instruction; the teacher read aloud while students sat silently. In another classroom, team members observed no differentiation; all students participated in a round-robin reading activity with no supports provided by the teacher or discussion by the students.
- The school's tiered support model is understood by school staff and consistently implemented with fidelity. Administrators who oversee multiple campuses, school administrators, and teachers offered similar descriptions of the school's system of supports for all learners. School administrators and teachers stated that this process has only recently

begun to be implemented in grades 6 through 8. However, teachers in grades 6 through 8 stated that they collaborate closely with the school staff for grades K through 5, who have implemented the process for some time, and that they are confident in their efforts to vertically align with the process already established for grades K through 5.

The school uses data to evaluate its support programming and to monitor student progress.

- According to the school's written description of its system of supports for all students, structures in place to regularly review student data include MTSS process meetings, academic and social-emotional/behavioral team meetings, administrative meetings, and professional development sessions. Some data (e.g., social-emotional data from the Panorama survey) is disaggregated by classroom, grade level, race, gender, and for English learners and students with disabilities. School administrators stated that the most recent analysis of disaggregated data occurred at the end of last school year, in June 2022, including reviews of both academic data (e.g., i-Ready reading and mathematics) and social-emotional data (Panorama SEL survey). Administrators who oversee multiple campuses reported that the school has recently made two significant changes based on an analysis of data: the school adopted a new intervention model for mathematics support (the "personal pathway for math" on the i-Ready platform) based on students' performance on the MCAS over the past few years, and the school began utilizing a new universal screener for reading (DIBELS) after a review of students' performance on assessments that are part of the school's new *Wonders* reading curriculum in grades K through 5.

## ORGANIZATIONAL VIABILITY

### CRITERION 9: GOVERNANCE

Members of the board of trustees uphold their responsibilities under Massachusetts law and regulations to act as public agents authorized by the state and provide competent and appropriate governance to ensure the success and sustainability of the school.

● Meets

*Finding: Throughout the charter term, members of the AKFCPS board have been active and involved in their roles as public agents, providing competent and appropriate governance and oversight of the school.*

- During a visit in Year 23 and during the renewal inspection, team members found evidence of board members being actively engaged in fulfilling their legal responsibilities and obligations to the school. The board meets regularly and has several active committees.
- During a visit in Year 23 and during the renewal inspection, team members found evidence of board members providing competent and appropriate governance and oversight of the charter school's administration, financial health, and progress towards meeting academic and other school goals. During the charter term, the board oversaw a transition in school leadership.

*Evidence gathered and reviewed as part of the renewal inspection:*



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The board of trustees fulfills its legal and fiduciary responsibilities.

- The board acts in compliance with most of the board's bylaws. The board has 6 approved members, within the range of 5 to 11 members permitted by the bylaws. The bylaws require that the board elect the following officers: chair, vice chair, treasurer, and clerk. Board members stated, and a review of the June 2022 annual meeting minutes confirmed, that the board elected only a chair, treasurer, and clerk. Meeting minutes include evidence that each of the committees required by the bylaws is active: executive, education, and finance. Meeting minutes indicate the following additional committees: governance; facilities (combined with the finance committee); diversity, equity, and inclusion (DEI); and an ad hoc committee that was formed to oversee the search for an executive director. The board met monthly during the period August 2021 through June 2022, more frequently than the quarterly meetings required by the bylaws.
- The board acts in compliance with the Open Meeting Law. Minutes for meetings of the full board, the education committee, the facilities and finance committee, the governance committee, and the DEI committee include a list of members who were present and the date, time, and location of each meeting, as well as summaries of discussions and records of votes. Board meeting minutes also list documents discussed during the meetings.
- The board approves appropriate school policies. For example, board members reported, and a review of the September 2021 board meeting minutes confirmed, that the board discussed and approved an updated enrollment policy. Minutes from the April 2022 board meeting showed a vote to approve the school calendar for the 2022-23 school year.
- The board demonstrates appropriate oversight of the school's efforts to be faithful to the mission. Board members stated that one of the board's primary roles is to be the keeper of the charter and the mission of the school. A review of board meeting minutes for the period August 2021 through June 2022 showed that the mission is read aloud at each meeting of the full board. Minutes for meetings of the education committee summarize detailed discussions of the school's programming for both academic excellence and character formation.
- The board demonstrates appropriate oversight of the school's academic performance. Board members and administrators who oversee multiple campuses reported that the executive director gives the board a detailed presentation of the school's academic progress at quarterly board meetings. Minutes from the September 2021 board meeting detail a discussion of students' participation and performance in the IB program. Minutes from the October 2021 education committee meeting show a discussion and analysis of the most recent MCAS results; this data was disaggregated by grade level, content area, and special education status.
- The board reviews data disaggregated to monitor the academic performance of some groups of students. As noted above, meeting minutes show that the board reviews MCAS data that is disaggregated by grade level, content area, and special education status; further student groups such as race or gender are not identified. Board members confirmed that they historically have examined student achievement data from MCAS and i-Ready assessments by grade level and content area, but not disaggregated by other student groups.
- The board demonstrates appropriate oversight of the school leader. Board members and administrators who oversee multiple campuses reported that the board evaluates the executive director annually using the Massachusetts Department of Elementary and Secondary Education superintendent rubric as a tool. Board members added, and the executive director confirmed, that they set goals collaboratively in the fall and check in monthly on progress toward those goals. Board members stated that the board chair begins

**Commented [AL4]:** DEI is not a committee of the Board of Trustees

**Commented [AL5]:** Monthly

the evaluation process in the spring by soliciting feedback from all board members, aggregates the responses, and reviews the evaluation at the annual board meeting. Minutes from the regular meeting held in June 2022 confirm that the board reviewed and discussed the executive director's annual evaluation; however, the board did not hold a vote to approve the evaluation.

- The board engages in governance tasks rather than management of day-to-day operations at the school. For example, board members reported, and a review of board meeting and governance committee meeting minutes confirms, that the governance committee is considering adding a seat to the board for a faculty representative. A review of minutes from the September 2021 board meeting provided another example of the board's focus on governance issues; the board conducted a review of the board's bylaws in order to update them.
- The board demonstrates appropriate oversight of the school's finances. Board members stated that the facilities and finance committee maintain detailed oversight of the school's financial status. A review of meeting minutes for both the full board and the facilities and finance committee confirms this, indicating that the chair of the facilities and finance committee regularly presents a finance report that includes profit and loss statements, a balance sheet, a statement of cash flows, a check ledger, and a review of budget-to-actuals. Board members also stated, and a review of the October 2021 meeting minutes for the facilities and finance committee confirmed, that the board engages an outside firm to conduct an annual audit of the school's finances.

The board of trustees fosters a culture of collaboration.

- The board communicates regularly with other members of the school community. Board members reported, and a review of board meeting minutes confirmed, that the board hears regular presentations from the executive director that include updates on academic progress, social-emotional programming and support, and operations. Minutes from the February 2022 facilities and finance committee describe a proposal to adjust the school's salary scale; this proposal was researched and presented by a committee that included members of the school's faculty.
- The board has clear and well-understood systems for decision-making. Board members reported, and a review of meeting minutes confirmed, that many decisions begin at the committee level and are then presented to the full board for discussion and a vote. For example, minutes from a meeting of the education committee held in June 2022 summarize discussion of a proposal to alter the school's dress code; minutes from a meeting of the full board held later in June indicate that the dress code proposal was presented at that meeting and approved by a unanimous vote.
- Board of trustees meetings foster open, deliberate, and thorough discussions to facilitate and ensure public accountability. Minutes from board meetings consistently record summaries of discussions among board members around various aspects of the school's program and operations.

The board of trustees engages in some strategic and continuous improvement planning.

- The board does not have a current, approved strategic plan. Board members reported that their most recent strategic plan covered a timeline through the 2021-22 school year. Board members added that they are working on a new strategic plan, with a goal of approving it by the end of the 2022-23 school year. A review of minutes from the June 2022 board meeting

confirmed this, summarizing a discussion between board members and the executive director about the timeline and process for developing a new strategic plan.

- The board is working to establish clear plans for board and school leadership succession. Board members stated that they recently undertook a search process to hire an executive director, explaining that the process began in 2020 but had to be put on hold due to the COVID-19 pandemic. A review of board meeting minutes confirmed that this search process resumed and led to the hiring of the current executive director. Board members stated, and review of board meeting minutes confirmed, that the board formed a governance committee in March 2022, which plans to develop formal plans for board and school leadership succession.
- The board recruits and selects new members who have expertise and skills that support effective governance and who have connections to the community. Board members stated that a new member was recently elected, recruited for their background and skills in business and finance; a review of minutes from the April 2022 governance committee meeting and the June 2022 annual board meeting confirm this. Board members added that part of the charge of the newly formed governance committee is to formalize a recruitment, nominating, vetting, and selection process for new board members.
- The board provides some training for board members to provide competent governance. Board members reported that the current onboarding process for new members consists of a meeting with the board chair to become acquainted with Open Meeting Law and board procedures and to make sure they understand board member responsibilities and compliance expectations. Board members further reported that the governance committee plans to create a more formal process both to onboard new members and to provide ongoing training for board members.

## APPENDIX A: ACCOUNTABILITY PLAN PERFORMANCE

### Faithfulness to Charter

	Charter Term Performance				Evidence
	M (Met) NM (Not Met)				
	Year 1	Year 2	Year 3	Year 4	
Objective: The School will provide students with an excellent education outcome by implementing the International Baccalaureate Programme (IB).					
Measure: 70% of the Grade 12 students participating in the IB Programme will achieve a score of 3 or higher on the IB exam annually.	M	NM	M	M	According to the school’s Application for Renewal and annual reports, the school met this measure three of four years this charter term.  2018-19: 93 percent of the grade 12 students participating in the IB Programme scored a three or higher on the annual IB exam.  2019-20: The International Baccalaureate Programme Organization canceled the exams for the class of 2020 cohort due to the COVID-19 pandemic.  2020-21: 98 percent of the grade 12 students participating in the IB Programme scored a three or higher on the annual IB exam.  2021-22: 99 percent of the grade 12 students participating in the IB Programme scored a three or higher on the annual IB exam.
Measure: Each year, 85% of the Grades 8-10 core subject teachers will align their unit and lesson planning with the IB learner profile.	M	M	M	M	According to the school’s Application for Renewal and annual reports, the school met this

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					<p>measure during all four years of this charter term.</p> <p>2018-19: Department meetings were held monthly using backward design to ensure the lower grades were aligning the curriculum, and to ensure the background information and skill development were aligned with the IB program requirements.</p> <p>2019-20: Department meetings were held monthly using backward design to ensure the lower grades were aligning the curriculum, and to ensure the background information and skill development were aligned with the IB program requirements.</p> <p>2020-21: Department meetings were held monthly using backward design to ensure the lower grades were aligning the curriculum, and to ensure the background information and skill development were aligned with the IB program requirements.</p> <p>2021-22: Department meetings were held monthly using backward design to ensure the lower grades were aligning the curriculum, and to ensure the background information and skill development were aligned with the IB program requirements.</p>
<b>Objective:</b> The school will provide teachers and staff with opportunities to engage in effective professional development to support academic excellence.					
<b>Measure:</b> Each year, 85% of the K-12 staff will attend a minimum of two professional development sessions in their subject area.	M	M	M	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure during all four years of this charter term.</p> <p>2018-19: 118 teachers and administrators attended two or more professional development sessions in their subject matter.</p>

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					<p>2019-20: 118 teachers and administrators attended two or more traditional professional development sessions up until March 2020. Due to the COVID-19 pandemic, the school did not compile the data for the remainder of the year.</p> <p>2020-21: All teachers and administrators attended two or more professional development sessions in their subject matter.</p> <p>2021-22: All teachers and administrators attended two or more professional development sessions in their subject matter.</p>
<p><b>Measure:</b> Over the course of the charter term, 50% of the core teachers in grades 8-10 will be trained in the IB method.</p>	NM	NM	NM	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure one of four years this charter term.</p> <p>2018-19: Five of the core subject matter teachers in grades 8 through 10 have been trained in the IB method.</p> <p>2019-20: Three of the core subject matter teachers in grades 8 through 10 have been trained in the IB method. The remaining sessions were canceled due to the COVID-19 pandemic.</p> <p>2020-21: Three of the core subject matter teachers in grades 8 through 10 have been trained in the IB method.</p> <p>2021-22: 77 percent of the core subject matter teachers in grades 8 through 10 have been trained in the IB method.</p>
<p><b>Measure:</b> By the end of the charter term, 85% of the grades 8-10 teachers will use the IB method in their instruction as demonstrated via the teacher evaluation system.</p>	M	NM	M	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure two of four years this charter term.</p> <p>2018-19: 100 percent of the 8-10 teachers were subject to three observations and lesson plan review regarding the IB approach to learning. 85</p>

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					<p>percent of the grade 10 teachers successfully implemented the IB approach.</p> <p>2019-2020: 100 percent of the teachers in grades 8-10 were subject to one or two observations and lesson plan reviews regarding the IB approaches to learning. Of that number, the IB coordinator focused on Grade 10 Spanish, Art, and Literature. However, this model was interrupted due to the school closure. Final teacher evaluations and observations are documented in TeachPoint.</p> <p>2020-21: 100 percent of the teachers in grades 8 through 10 were subject to virtual observations and lesson plan reviews. The IB coordinator focused on research skills and plagiarism.</p> <p>2021-22: 100 percent of the teachers in grades 8 through 10 were subject to virtual observations and lesson plan reviews.</p>
<b>Objective:</b> Abby Kelley Foster Charter Public School will provide students with access to an excellent music program.					
<p><b>Measure:</b> 100% of the high school students participating in the instrumental and vocal programs will demonstrate competence of their musical instrument by their senior year as measured by a solo performance assessment annually.</p>	M	M	M	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure during all four years of this charter term.</p> <p>2018-19: 100 percent of the seniors participating in the instrumental vocal program demonstrated musical competency as measured by a solo performance assessment</p> <p>2019-20: 100 percent of the seniors participating virtually and in person in the instrumental vocal program demonstrated musical competency as measured by a solo performance assessment.</p> <p>2020-21: 100 percent of the seniors participating virtually and in person in the instrumental vocal</p>



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					<p>program demonstrated musical competency as measured by a solo performance assessment.</p> <p>2021-22: 100 percent of the seniors participating in the instrumental vocal program demonstrated musical competency as measured by a solo performance assessment.</p>
<p><b>Measure:</b> The music department will increase the visibility of the K-12 ensemble performances based on the 2014 National Music Standards.</p>	M	NM	M	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure three of four years this charter term.</p> <p>2018-19: The music department increased their visibility during the school year and 90 percent of the choir, band, and stings traveled to Philadelphia's historical sites to perform. Music performances included: Nutcracker, Railers, Bravehearts, Worcester Youth Orchestra. Documentation is maintained by the music director.</p> <p>2019-20: The school did not meet this measure due to the school closure. Spring music performances would have included: Railers, Bravehearts, and Worcester Youth Orchestra.</p> <p>2020-21: The music department increased their visibility virtually during the school year including virtual concerts, YouTube performances and virtual musicals.</p> <p>2021-22: The music department went back to in-person concerts for grades K-12, performed at community events like City of Worcester tree lighting and the Bravehearts game, and competed in MICCA where we took home a gold medal and then were invited to perform for the state at Mechanics Hall Showcase.</p>

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<b>Objective:</b> Abby Kelley Foster Charter Public School will support parents as partners in their child's education.					
<p><b>Measure:</b> Annually, 75% of the Elementary School parents/guardians surveyed will report that Abby Kelley Foster supports parents as partners in their child's education. At least 40% of parents will take the survey annually.</p>	NM	NM	NM	NM	<p>According to the school's Application for Renewal and annual reports, the school did not meet this measure during the charter term.</p> <p>2018-19: 98 percent of the elementary parents reported that AKF supports them as partners in their child's education with 36 percent of the parents responding to the survey.</p> <p>2019-20: The survey was not administered due to the COVID-19 pandemic.</p> <p>2020-21: The school determined to postpone the survey due to the number of surveys parents received during the school year.</p> <p>2021-22: The school determined that a more inclusive and expanded school culture survey was necessary to due to impact of the pandemic on our families. The survey did not specifically ask this question. However, we did ask the question slightly different than "Do you feel your student has a trusted adult at school. More than 64 percent of families felt their student was comfortable or extremely comfortable in asking for help from an adult at school.</p> <p>The school also surveyed other important topics for families such as Barriers to Engagement, School Safety, Readiness for Learning, and School Fit. The results of the survey are available for the review.</p>
<p><b>Measure:</b> Annually, 75% of the Middle School parents/guardians of students nominated for the character virtue of the month will attend the monthly character virtue breakfast.</p>	M	M	NM	NM	<p>According to the school's Application for Renewal and annual reports, the school met this measure two of four years this charter term.</p> <p>2018-19: 83 percent of the parents of middle school students who were nominated for</p>

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					<p>character education awards attended the character education breakfast.</p> <p>2019-20: 85 percent of the parents of middle school students who were nominated for character education awards attended the character education breakfast prior to the school closure. The remaining events were canceled.</p> <p>2020-21: Due to the COVID-19 restrictions the school did not host character virtue breakfasts. However, a virtual awards ceremony was provided.</p> <p>2021-22: Due to COVID-19 restrictions the school did not host character virtue breakfasts. However, a virtual awards ceremony was provided.</p>
<p><b>Measure:</b> Annually, 50% of the High School parents/guardians will attend a parent information night regarding college planning, financial planning and/or the IB Programme.</p>	M	M	M	NM	<p>According to the school's Application for Renewal and annual reports, the school met this measure three of four years this charter term.</p> <p>2018-19: 61 percent of the high school parents attended one of the information sessions hosted by the guidance and/or IB department.</p> <p>2019-20: 50 percent of high school parents attended one of the information sessions hosted by the guidance and/or IB department prior to school closure; however, due to COVID--19 restrictions, the end of year meetings were held virtually.</p> <p>2020-21: 50 percent high school parents attended one of the information sessions hosted by the guidance and/or IB department.</p> <p>2021-22: Sessions regarding IB, college and career person were hosted virtually during the fall of 2021. Due to the COVID-19 restrictions, sessions were hosted virtually and recorded for families to view at their convenience. Data</p>

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					regarding the percentage of families attending the sessions was not recorded.
<b>Objective:</b> Abby Kelley Foster Charter Public School students will model the school's character virtues.					
<b>Measure:</b> 100% of the students in each graduating class will complete 50 hours of community service over the course of their high school career.	M	M	NM	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure three of four years this charter term.</p> <p>2018-19: 100 percent of the students in the graduating class completed 50 hours of community service over the course of their high school career.</p> <p>2019-20: 100 percent of the students in the graduating class completed 50 hours of community service over the course of their high school career.</p> <p>2020-21: 100 percent of the students in the graduating class completed 50 hours of community service over the course of their high school career.</p> <p>2021-22: 100 percent of the students in the graduating class completed 50 hours of community service over the course of their high school career.</p>
<b>Measure:</b> Each year, the Elementary School and Middle School students will each complete a minimum of two school-based community service projects	M	NM	M	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure three of four years this charter term.</p> <p>2018-19: The elementary and middle school coordinated community service activities to support the Worcester County Food Bank, Operation Gratitude and Earth Day cleanup with our neighbor Saint Gobain. Classroom teachers maintain documentation regarding community services projects and published in the school newsletters.</p>

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					<p>2019-20: The elementary and middle school coordinated community service activities to support the Worcester County Food Bank, recycling, and letters to soldiers. However, the spring events were canceled due to COVID-19.</p> <p>2020-21: The elementary and middle school staff coordinated community service activities to support Bucky's Food Pantry, Good Samaritan Food Pantry, Coalition for a Healthy Worcester, Earth Day Clean up and Abby's Attic. The school district held fundraisers for the families of the district who lost their home to a fire and those impacted by death of a family member due to COVID-19.</p> <p>2021-22: The elementary and middle school staff coordinated community service activities to support Abby's House, Read Across America, Greater Worcester Community Food Bank, Earth Day Clean up and Abby's Attic.</p>
<b>Objective:</b> Abby Kelley Foster Charter School will partner with area public schools to create a network of learning opportunities and sharing of best practice over the term of the charter.					
<b>Measure:</b> Abby Kelley Foster will engage annually with a local public school to share best practices regarding Abby Kelley Foster's response to the intervention model and/or co-teaching model.	M	M	M	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure during all four years of this charter term.</p> <p>2018-19: The elementary principal met monthly with the principal of Nelson Place (WPS) to coordinate the RTI programming and supports.</p> <p>2019-20: The elementary principal met monthly with the principal of Nelson Place (WPS) to coordinate student support programming through the month of February.</p> <p>2020-21: The elementary principal met virtually with the principal of Nelson Place (WPS) to</p>

Abby Kelley Foster Charter Public School  
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					<p>coordinate student support programming and special education services.</p> <p>2021-22: The elementary principal met with members of the regional principals group. Members include Sudbury, Grafton, Wayland, Belmont to share best practices regarding the MTSS model of support for all learners. Documentation maintained by the ES principal.</p>
<p><b>Measure:</b> Annually, Abby Kelley Foster will share best practices regarding the IB method by collaborating with the Guild of International Baccalaureate Schools (GIBS) of the Northeast.</p>	M	M	M	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure during all four years of this charter term.</p> <p>2018-19: The high school IB teachers attended eight GIBS round table meetings during the school year.</p> <p>2019-20: The high school IB teachers attended 10 GIBS round table meetings during the school year. Documentation maintained by the IB coordinator.</p> <p>2020-21: The HS IB teachers and IB Coordinator participated in virtual meetings in their subject matter throughout the school year.</p> <p>2021-22: The HS IB teachers and IB Coordinator participated in virtual meetings in their subject matter throughout the school year. The IB Coordinator participated in the IB Global Conference in July 2022, which includes North, South, Central America and European participates to share best practices in the IB method.</p>
<p><b>Measure:</b> Annually, Abby Kelley Foster will host one GIBS meeting to collaborate with regional IB instructors in the areas of lesson planning, exam preparation, skill development and assessment.</p>	M	M	M	M	<p>According to the school's Application for Renewal and annual reports, the school met this measure during all four years of this charter term.</p>

Abby Kelley Foster Charter Public School  
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					<p>2018-19: Abby Kelley Foster hosted one GIBS regional IB Coordinators meeting.</p> <p>2019-20: Abby Kelley Foster hosted three GIBS regional IB Coordinators meetings.</p> <p>2020-21: Abby Kelley Foster hosted the GIBS regional IB Coordinators meetings virtually. Documentation was maintained by the IB coordinator.</p> <p>2021-22: Abby Kelley Foster hosted the GIBS regional IB Coordinators meetings virtually. Documentation was maintained by the IB coordinator.</p>
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APPENDIX B: FINANCE

**Commented [BP(6)]:** A copy of the school's [Financial Dashboard](#) will be pasted below after the dashboard has been updated with data for 2022.

## APPENDIX C: SOURCES OF EVIDENCE

- The school's Application for Renewal (2022)
- Academic performance data: [Profile](#)
- Accountability Plan performance (2019-22)
- Annual reports (2019-22)
- Summary of Review (2018)
- Site visit reports for visits conducted during the charter term (2019-22)
- [Coordinated Program Review Reports](#) and [Tiered Focused Monitoring Reports](#) conducted during the charter term (2019-22)
- [The school's website](#)
- Recruitment materials
- Translated documents
- Student enrollment data and student indicator data: [Charter Analysis and Review Tool](#) (CHART)
- Recruitment and Retention Plans (2019-22)
- Staff roster
- Staff qualifications: [Education Personnel Information Management System \(EPIMS\)](#); [Educator Licensure and Renewal \(ELAR\)](#)
- District Curriculum Accommodation Plan
- A written description of the school's system of supports for all learners provided by the school
- Aggregated teacher, student, and family survey data
- Board of trustees bylaws
- Board of trustees meeting minutes
- Board of trustees committee meeting minutes
- The board's most recent self-evaluation (2021-22)
- The board's most recent evaluation of the school leader (2022)
- Renewal Inspection Evidence (2022)

## APPENDIX D: RENEWAL INSPECTION METHODOLOGY

The following individuals conducted the renewal inspection:

- **Dominique Astier, Team Member**, is a consultant for SchoolWorks. She taught French and Spanish for 15 years in Rhode Island, New York, and Massachusetts and served as a department head, student counselor, and teacher mentor. For the past 15 years, she has been working as a consultant, conducting charter school inspections and DOE reviews of underperforming and exemplary schools in Massachusetts and New York; developing and guiding the implementation of school improvement plans; conducting program evaluations in various states across the nation; and conducting research on the impact of federal grants on school improvement. Dominique holds a BS in Education and an MA in French Language and Literature from the Ohio State University. She is fluent in French and Spanish.
- **Chad Ferguson, Team Writer**, is a consultant for SchoolWorks. He began his career teaching middle school science in the Mississippi Delta as part of Teach for America, and he helped lead the Teach For America training institute for many years. He taught high school math and science in the Bronx and has served as a principal and assistant principal in Harlem, Brooklyn, and Charleston, South Carolina. Chad has served in executive leadership roles for two charter school networks, as Executive Director of Citizens of the World Charter Schools in Brooklyn, and as Interim Chief Academic Officer for St. HOPE Public Schools in Sacramento. Chad has held several leadership positions at the New York City Department of Education and at Washington DC Public Schools. In New York, he was the Chief Academic Officer for District 79, which serves students in incarcerated settings, substance abuse programs, GED programs, and pregnant and parenting students. In DC, Chad was the Instructional Superintendent for Alternative Schools and Programs and the Deputy Chief of Youth Engagement, managing district-wide student attendance, behavior and school culture, health and wellness, and targeted student support efforts. Chad holds a bachelor's degree in psychology from the University of Chicago and a master's degree in education administration from Teachers College, Columbia University.
- **Stephanie Patton, Team Leader**, is a consultant for SchoolWorks. Before moving into a consultant role, Stephanie was the Senior Director of the Fellowship at BES, a national nonprofit that identifies and prepares excellent leaders to transform education in their communities. In this role, Stephanie led the BES Fellowship, training and supporting over 50 leaders to design, found, and lead high-achieving schools. Prior to her work at BES, she served in a network leadership role at Excel Academy, supporting the growth of its principals. Stephanie began her career teaching middle school science with the New York City DOE and joined Excel Academy in 2007, initially as a science teacher and Dean of Students. She then was the Founding Principal at Excel Academy-Chelsea, leading the team to successfully educate the first four cohorts of students. She received an MS in teaching from Pace University and a BA in neuroscience/psychobiology from Connecticut College.
- **Mirna Vega-Wilson, Team Member**, is a consultant for SchoolWorks, and an experienced and results-driven leadership coach for school principals. Specializing in both leadership coaching and special education technical assistance, she has served as a leadership coach on behalf of SchoolWorks, EdVestors, and the Boston Public Schools Office of Human Capital, providing targeted assistance to multiple schools and school leaders throughout Massachusetts. Mirna previously served as an Assistant Academic Superintendent / Elementary B for Boston Public Schools, as the Principal of Curley K-8 Lower School in Jamaica Plain, and as the principal of Ellis Mendell School in Roxbury. She is certified in Massachusetts as an Elementary K-8 Teacher,

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Principal/Assistant Principal Pre K-6, and Supervisor/Director, and a Superintendent/Assistant Superintendent at all levels. Mirna holds a Master of Education, from Boston University with a focus on Special Education and a Bachelor of Arts in Education from Herbert H. Lehman College.

The renewal inspection was conducted for AKFCPS on September 14, 2022. The renewal inspection team (the team) held focus group interviews, conducted classroom observations, and reviewed documents and other information provided by the school as part of the renewal process.<sup>25</sup>

The team conducted interviews with the following stakeholder groups:

- Board of trustees: The team interviewed two board members, including the chair and treasurer.
- Administrators who oversee multiple campuses: The team interviewed the executive director, director of finance, director of guidance and counseling services, director of special education, director of English as a second language (ESL), and director of information technology.
- School administrators: The team interviewed the principal for grades K through 3, assistant principal for grades K through 3, principal for grades 4 through 8, curriculum coordinator for grades 4 through 8, principal for grades 9 through 12, assistant principal/curriculum coordinator for grades 9 through 12, and assistant principal/IB coordinator for grades 9 through 12.
- Teachers: The team interviewed four general education teachers, including teachers representing grades 3, 7, 9, and 11, and the following content areas: English language arts, science, and social studies. The team also interviewed one special education teacher, one ESL teacher, one school interventionist for grades K through 3, one school reading specialist for grades K through 3, one math coach for grades 4 through 8, and two guidance counselors.

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**Commented [AL8]:** Should be 4-7

**Commented [AL9]:** Should be 8-12

**Commented [AL10]:** Should be 8-12

**Commented [AL11]:** Should be 8-12

**Commented [AL12]:** Should be 4-7

The team conducted 32 classroom observations and recorded evidence of what they saw using a classroom observation form developed by the Office of Charter Schools and School Redesign. The form is aligned with the areas of inquiry referenced in the section *Key Indicator 6.2: Instruction* of this report. Team members observed classrooms in grades K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, and 12, and in a variety of content areas, including English language arts, mathematics, science, social studies, and foreign language.

The renewal inspection schedule is included on the following page.

<sup>25</sup> See the [Application for Renewal of a Public School Charter](#) and the [Renewal Inspection Protocol](#) for a complete listing of the documents and other information provided by schools as part of the renewal process.

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**RENEWAL INSPECTION SCHEDULE**

September 14, 2022

Time	Stephanie Patton	Chad Ferguson	Dominique Astier	Mirna Vega-Wilson
7:00	Team Arrival			
7:00-7:30	Team Orientation and Planning			
7:30-8:00	Meeting with Head(s) of School			
8:00-9:00	School Administrators Who Oversee Multiple Campuses Focus Group		Classroom Observations	Classroom Observations
9:00-10:00	Board Focus Group		Classroom Observations	Classroom Observations
10:00-11:00	Classroom Observations	School Administrator Focus Group		Classroom Observations
11:00-12:00	Teacher Focus Group (K-5)		Teacher Focus Group (6-12)	
12:00-1:00	Working Lunch: Team Deliberations and Document Review			
1:00-2:00	Classroom Observations	Classroom Observations	Classroom Observations	Classroom Observations
2:00-3:00	Classroom Observations & Document Review	Classroom Observations & Document Review	Document Review	Document Review
3:00-6:00	Team Deliberations and Coming to Consensus			
6:00	Team Departs			

# Abby Kelley Foster Charter Public School

## District Wellness Policy

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# **Abby Kelley Foster Charter Public School**

## **District Wellness Policy**

### **Preamble**

Abby Kelley Foster Charter Public School (hereto referred to as the District) is committed to the optimal development of every student. The District believes that for students to have the opportunity to achieve personal, academic, developmental, emotional, and social success, we need to create positive, safe, and health-promoting learning environments at every level, in every setting, throughout the school year.

Research shows that two components, good nutrition and physical activity before, during, and after the school day, are strongly correlated with positive student outcomes. For example, student participation in the U.S. Department of Agriculture's (USDA) School Breakfast Program is associated with higher grades and standardized test scores, lower absenteeism, and better performance on cognitive tasks. Conversely, less-than-adequate consumption of specific foods, including fruits, vegetables, and dairy products, is associated with lower grades among students. In addition, students who are physically active through active transport to and from school, recess, physical activity breaks, high-quality physical education, and extracurricular activities – do better academically. Finally, there is evidence that adequate hydration is associated with better cognitive performance.

This policy outlines the District's approach to ensuring environments and opportunities for all students to practice healthy eating and physical activity behaviors throughout the school day while minimizing commercial distractions. Specifically, this policy establishes goals and procedures to ensure that:

- Students in the District have access to healthy foods throughout the school day – both through reimbursable school meals and other foods available throughout the school campus– in accordance with Federal and state nutrition standards;
- Students receive quality nutrition education that helps them develop lifelong healthy eating behaviors;
- Students have opportunities to be physically active before, during, and after school;
- Schools engage in nutrition and physical activity promotion and other activities that promote student wellness;
- School staff are encouraged and supported to practice healthy nutrition and physical activity behaviors in and out of school;
- The community is engaged in supporting the work of the District in creating continuity between school and other settings for students and staff to practice lifelong healthy habits; and
- The District establishes and maintains an infrastructure for management, oversight, implementation, communication about, and monitoring of the policy and its established goals and objectives.

This policy applies to all students, staff, and schools in the District.



## **I. District Wellness Committee (DWC)**

### ***Committee Role and Membership***

The District's intent is to convene a representative district wellness committee (hereto referred to as the DWC) that (will) meet at least four times per year to establish goals for and oversee school health and safety policies and programs, including development, implementation, and periodic review and update of this district-level wellness policy (heretofore referred as "wellness policy").

The DWC membership is intended to represent all school levels and includes (to the extent possible) including parents and caregivers; students; representatives of the school nutrition program; physical education teachers; health education teachers; school health professionals, and mental health and social services staff; school administrators, school board members; health professionals; and the general public. (See Appendix A) To the extent possible, the DWC will include representatives from each school building and reflect the diversity of the community.

### ***Leadership***

The Executive Director or designee(s) will convene the DWC, facilitate the development of and update the wellness policy, and ensure each school's compliance with the policy.

Each school will designate a wellness policy coordinator to ensure compliance with the policy. Refer to Appendix A for a list of school-level wellness policy coordinators.

## **II. Wellness Policy Implementation, Monitoring, Accountability, and Community Engagement**

### ***Implementation Plan***

The District will develop and maintain a plan for implementation to manage and coordinate the execution of this wellness policy.

### ***Recordkeeping***

The District's Wellness Policy is maintained in the office of the District's Executive Director. Documentation maintained in this location will include but will not be limited to

- The written wellness policy;
- Documentation demonstrating that the policy has been made available to the public via [akfcs.org](http://akfcs.org)
- Documentation of efforts to review and update the Local Schools Wellness Policy, including an indication of who is involved in the update and methods the district uses to make stakeholders aware of their ability to participate in the DWC;
- Documentation to demonstrate compliance with the annual public notification requirements;
- The most recent assessment on the implementation of the local school wellness policy;
- Documentation demonstrating the most recent assessment of the implementation of the Local School Wellness Policy has been made available to the public.

### ***Annual Notification of Policy***

The District will actively inform families and the public each year of basic information about this policy, including its content, any updates to the policy, and implementation status. The District will make this information available via the district website and/or district-wide communications. Annually, the District will also publicize the name and contact information of the District/school officials leading and coordinating the committee and information on how the public can get involved with the school wellness committee.

### ***Triennial Progress Assessments***

At least once every three years, the District will evaluate compliance with the wellness policy to assess the implementation of the policy and include:

- The extent to which schools under the jurisdiction of the District are in compliance with the wellness policy;
- The extent to which the District's wellness policy compares to the Alliance for a Healthier Generation's model wellness policy; and
- A description of the progress made in attaining the goals of the District's wellness policy.

The position/person responsible for managing the triennial assessment and contact information is the Director of Finance and Operations of the Abby Kelley Foster Charter Public School, Alisha Carpino, 10 New Bond Street, Worcester, Massachusetts 01606 [arcarpino@akfcs.org](mailto:arcarpino@akfcs.org)

The DWC, in collaboration with individual schools, will monitor schools' compliance with this wellness policy.

The District will make the triennial progress report available by posting it on the school's website.

### ***Revisions and Updating the Policy***

The DWC will update or modify the wellness policy based on the results of the annual School Health Index and triennial assessments and/or as District priorities change; community needs change; wellness goals are met; new health science, information, and technology emerges; and new Federal or state guidance or standards are issued. **The wellness policy will be assessed and updated as indicated at least every three years following the triennial assessment.**

### ***Community Involvement, Outreach, and Communications***

The District is committed to being responsive to community input, which begins with awareness of the wellness policy. The District will actively communicate ways in which representatives of DWC and others can participate in the development, implementation, and periodic review and update of the wellness policy through a variety of means appropriate for that district. The District will also inform parents of the improvements that have been made to school meals and compliance with school meal standards, availability of child nutrition programs and how to apply, and a description of and compliance with Smart Snacks in School nutrition standards. The District will use electronic mechanisms, such as email or displaying notices on the district's website, as well as non-electronic mechanisms, such as newsletters, presentations to parents, or sending information home to parents, to ensure that all families are actively notified of the content of, implementation of, and updates to the wellness policy, as well as how to get involved and support the policy. The District will ensure that communications are culturally and linguistically appropriate to the community and accomplished through means similar to other ways that the district and individual schools are communicating important school information with parents.

The District will actively notify the public about the content of or any updates to the wellness policy annually, at a minimum. The District will also use these mechanisms to inform the community about the availability of the annual and triennial reports.

### **III. Nutrition**

#### ***School Meals***

Our school district is committed to serving healthy meals to children, with plenty of fruits, vegetables, whole grains, and fat-free and low-fat milk; that are moderate in sodium, low in saturated fat, and have zero grams *trans* fat per serving (nutrition label or manufacturer's specification); and to meeting the nutrition needs of school children within their calorie requirements. The school meal programs aim to improve the diet and health of school children, help mitigate childhood obesity, model healthy eating to support the development of lifelong healthy eating patterns, and support healthy choices while accommodating cultural food preferences and special dietary needs.

All schools within the District participate in USDA child nutrition programs, including the National School Lunch Program (NSLP) and the School Breakfast Program (SBP). All schools within the District are committed to offering school meals through the NSLP and SBP programs, and other applicable Federal child nutrition programs, that:

- Are free under *Community Eligibility Provision* and accessible to all students;
- Meet the USDA school meal nutrition standards, especially for foods and beverages provided during breakfast and lunch periods;
- Are appealing and attractive to children;
- Are served in clean and pleasant settings;
- Meet or exceed current nutrition requirements established by local, state, and Federal statutes and regulations.
- Promote healthy food and beverage choices using [Smarter Lunchroom techniques](#):
  - Whole fruit options are displayed in attractive bowls or baskets (instead of chafing dishes or hotel pans).
  - Fresh sliced, cut, or whole fruits are available daily.
  - Daily fruit options are displayed in a location in students' line of sight and reach.
  - Vegetable options have been given creative or descriptive names.
  - Daily vegetable and fruit requirements for a reimbursable meal are bundled into all grab-and-go lunches available to students.
  - Students receiving these grab-and-go alternate meals have complete access to the ½ cup serving of hot vegetables and ½ c. serving of fruit offered with the main entrée.
  - All staff members, especially those serving, have been trained to politely prompt students to select and consume the daily vegetable options with their meal.
  - Fat-Free White milk is placed in front of other beverages in all coolers.
  - Alternative entrée options (i.e., salads, yogurt parfaits, etc.) are highlighted on posters or signs within all service and dining areas.

- All reimbursable meals can be created in any service area available to students (i.e., grab-n-go salads, grab-n-go vegetarian options, etc.).
- Student surveys and taste testing opportunities are used to inform menu development, dining space decor, and promotional ideas.
- Student artwork, if available, is displayed in the service and/or dining areas.
- Announcements are used to promote and market menu options, as well as on monthly menus.
- Promotional and informative Materials provided by Project Bread are placed in hallways, sent home with students, and added to the school website as well as social media pages.
- All students will receive a minimum of 20 minutes to sit and eat lunch once the meal is obtained.

The District takes steps to protect the privacy of all students who are categorized as free, reduced, and/or paid meal benefits. All cafeterias are cashless as well as low-balance letters are emailed weekly to parents/guardians. These payments can be processed discreetly online at PaySchoolsCentral.com. All POS terminals are faced away from all students during breakfast and lunch services. With the exception of the high school terminal, which is covered by an anti-glare and privacy filter cover.

Abby Kelley Foster Charter School Food & Nutrition staff members avoid stigmatizing students who are unable to pay for their bill. It is prohibited for students with unpaid balances to be shamed in any way, including announcing student name, using a separate serving line, hand stamp, or sticker of any sort, and giving a notification to a student to send home to parents/guardians.

Nutrition Services will continue to look into USDA farm-to-fresh school programs as seen available to the NSLP and SBP using the <https://www.fns.usda.gov/farmtoschool/farm-school> website. If implemented, cafeteria staff will create and provide taste tests for locally grown fruits and vegetables.

### ***Staff Qualifications and Professional Development***

All school nutrition and food service directors, managers, and staff will meet or exceed hiring and annual continuing education/training requirements in the [USDA professional standards for child nutrition professionals](#). These school nutrition personnel will refer to [USDA's Professional Standards for School Nutrition Standards website](#) to search for training that meets their learning needs. All Nutrition and Food Staff trainings are recorded and managed here: [Dashboard | Professional Standards Training Tracker \(usda.gov\)](#)

### ***Water***

To promote hydration, free, safe, unflavored drinking water will be available to all students throughout the school day\* and throughout every school campus\* ("school campus" and "school day" are defined in the glossary). The District will make drinking water available where school meals are served during meal periods.

### ***Competitive Foods and Beverages***

The District is committed to ensuring that all foods and beverages available to students on the school campus\* during the school day\* support healthy eating. The foods and beverages sold and served outside of the school meal programs (e.g., “competitive” foods and beverages, vending machines) will meet all federal, state and local standards for all nutrient and competitive food guidelines. Smart Snacks aim to improve student health and well-being, increase the consumption of healthful foods during the school day and create an environment that reinforces the development of healthy eating habits. A summary of the standards and information and a Guide to Smart Snacks in Schools are available at:

<http://www.fns.usda.gov/healthierschoolday/tools-schools-smart-snacks>. The Alliance for a Healthier Generation provides a set of tools to assist with the implementation of Smart Snacks available at [www.foodplanner.healthiergeneration.org](http://www.foodplanner.healthiergeneration.org).

To support healthy food choices and improve student health and well-being, all foods and beverages outside the reimbursable school meal programs that are sold to students on the school campus during the school day will meet or exceed the USDA Smart Snacks nutrition standards. These standards will apply in all locations and through all services where foods and beverages are sold, which may include, but are not limited to, à la carte options in cafeterias, vending machines, school stores, and snack or food carts. Vending machines will also be unplugged during the school hours and only opened after school has been dismissed. No caffeine products will be permitted for sale to students in any School District buildings.

### ***Celebrations and Rewards***

All foods offered on the school campus will meet or exceed the USDA Smart Snacks in School nutrition standards, including through:

1. Celebrations and parties. While student handbooks cite that no food from families is allowed, if there ever a situation where this does happen, the district will provide a list of healthy party ideas to parents and teachers, including non-food celebration ideas. Healthy party ideas are available from the Alliance for a Healthier Generation and from the USDA.
2. Rewards and incentives. The District will provide teachers and other relevant school staff with a list of alternative ways to reward children. Foods and beverages will not be used as a reward or withheld as punishment for any reason, such as for performance or behavior.

### ***Fundraising***

Foods and beverages that meet or exceed the USDA Smart Snacks in Schools nutrition standards may be sold through fundraisers on the school campus\* during the school day\*. The District will make available to parents and teachers a list of healthy fundraising ideas [*examples from the Alliance for a Healthier Generation and the USDA*].

- *Schools will encourage fundraisers promoting physical activity (such as walk-a-thons, Jump Rope for Heart, fun runs, etc.).*
- *Fundraising during school hours, on school grounds, will sell non-food items or foods and beverages that meet or exceed the Smart Snacks nutrition standards. These fundraisers may include but are not limited to donation nights at restaurants, cookie dough, candy, and pizza sales, market days, etc.*

### ***Nutrition Promotion***

Nutrition promotion and education positively influence lifelong eating behaviors by using evidence-based techniques and nutrition messages and by creating food environments that encourage healthy nutrition choices and encourage participation in school meal programs. Students and staff will receive consistent nutrition messages throughout schools, classrooms, gymnasiums, and cafeterias. Nutrition promotion also includes marketing and advertising nutritious foods and beverages to students. It is most effective when implemented consistently through a comprehensive and multi-channel approach by school staff, teachers, parents, students, and the community.

The District will promote healthy food and beverage choices for all students throughout the school campus and encourage participation in school meal programs. This promotion will occur through at least:

- Implementing at least ten or more evidence-based healthy food promotion techniques through the school meal programs using [Smarter Lunchroom techniques](#); and
- Ensuring 100% of foods and beverages promoted to students meet the USDA Smart Snacks in School nutrition standards. Additional promotion techniques that the District and individual schools may use are available at <http://www.foodplanner.healthiergeneration.org/>.

### ***Nutrition Education***

The District will teach, model, encourage and support healthy eating by all students. Schools will provide nutrition education and engage in nutrition promotion that:

- Is designed to provide students with the knowledge and skills necessary to promote and protect their health;
- Is part of not only health education classes but also integrated into other classroom instruction through subjects when feasible;
- Promotes fruits, vegetables, whole-grain products, low-fat and fat-free dairy products, and healthy food preparation methods;
- Emphasizes caloric balance between food intake and energy expenditure (promotes physical activity/exercise);
- Links with school meal programs and cafeteria nutrition promotional advertisement; Teaches media literacy with an emphasis on food and beverage marketing; and
- Includes nutrition education training for teachers and other staff.
- Promotes nutrition education through school clubs and extracurricular activities such as Middle School's Central Perk Cafe
- School gardens are encouraged to promote and facilitate nutritional education.

### ***Food and Beverage Marketing in Schools***

The District is committed to providing a school environment that ensures all students can practice healthy eating and physical activity behaviors throughout the school day while minimizing commercial distractions. The District strives to teach students how to make informed choices about nutrition, health, and physical activity. These efforts will be weakened if students are subjected to advertising on District property that contains messages inconsistent with the health information the District is imparting through nutrition education and health promotion efforts. It is the intent of the District to protect and promote students' health by permitting advertising and



marketing for only those foods and beverages that are permitted to be sold on the school campus, consistent with the District's wellness policy.

Any foods and beverages marketed or promoted to students on the school campus during the school day will meet or exceed the USDA Smart Snacks in School nutrition standards. Food and beverage marketing is defined as advertising and other promotions in schools. Food and beverage marketing often includes an oral, written, or graphic statement made for the purpose of promoting the sale of a food or beverage product made by the producer, manufacturer, seller, or any other entity with a commercial interest in the product.<sup>1</sup> This term includes, but is not limited to, the following:

- Brand names, trademarks, logos, or tags, except when placed on a physically present food or beverage product or its container.
- Displays, such as on vending machine exteriors
- Corporate brand, logo, name, or trademark on school equipment, such as marquees, message boards, scoreboards, or backboards
- Corporate brand, logo, name, or trademark on cups used for beverage dispensing, menu boards, coolers, trash cans, and other food service equipment, as well as on posters, book covers, pupil assignment books, or school supplies displayed, distributed, offered or sold by the District.
- Advertisements in school publications or school mailings.
- Free product samples, taste tests, coupons of a product, or free samples displaying advertising of a product.

As the District/school nutrition services/Athletics Department/ PTO/ Booster Club, etc., reviews existing contracts and considers new contracts, equipment, and product purchasing (and replacement) decisions should reflect the applicable marketing guidelines established by the District wellness policy.

#### **IV. Physical Activity**

Abby Kelley shall align with the [state physical education standards](#) for K-12 curriculum. It is recommended that children and adolescents should participate in at least 60 minutes of physical activity every day. A substantial percentage of students' physical activity can be provided through a comprehensive school physical activity program (CSPAP). A CSPAP reflects strong coordination and synergy across all of the components: quality physical education as the foundation; physical activity before, during, and after school; staff involvement and family and community engagement, and the district is committed to providing these opportunities. Physical activity during the school day (including but not limited to recess, classroom physical activity breaks, or physical education) **will not be withheld** as punishment for any reason. To the extent practicable, the District will ensure that its grounds and facilities are safe and that equipment is available to students to be active. ***Physical Education***

The District will provide students with physical education using an age-appropriate, sequential physical education curriculum consistent with national and state standards for physical education. The physical education curriculum will promote the benefits of a physically active lifestyle, help

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students develop skills to engage in lifelong healthy habits, and incorporate essential health education concepts. The curriculum will support the essential components of physical education.

All students will be provided equal opportunities to participate in physical education classes. The District will make appropriate accommodations to allow for equitable participation for all students and will adapt physical education classes and equipment as necessary.

The District physical education program will promote student physical fitness through individualized fitness and activity assessments.

### ***Recess (Elementary)***

The elementary school (and through grade 5) will offer at least **20 minutes of recess** on all days during the school year. *This policy may be waived on early dismissal or late arrival days.* If recess is offered before lunch, schools will have appropriate hand-washing facilities and/or hand-sanitizing mechanisms located just inside/outside the cafeteria to ensure proper hygiene prior to eating, and students are required to use these mechanisms before eating. Hand-washing time, as well as time to put away coats/hats/gloves, will be built into the recess transition period/time frame before students enter the cafeteria.

**Outdoor recess** will be offered when the weather is feasible for outdoor play.

In the event that the school or district must conduct **indoor recess**, teachers and staff will follow the indoor recess guidelines that promote physical activity for students to the extent practicable. Recess will complement, not substitute, physical education class. Recess monitors or teachers will encourage students to be active and will serve as role models by being physically active alongside the students whenever feasible.

### ***Classroom Physical Activity Breaks (Elementary and Secondary)***

The District recognizes that students are more attentive and ready to learn if provided with periodic breaks when they can be physically active or stretch. Thus, students will be offered **periodic opportunities** to be active or to stretch throughout the day on all or most days during a typical school week. The District recommends teachers provide short (3-5-minute) physical activity breaks to students during and between classroom time at least three days per week. These physical activity breaks will complement, not substitute, for physical education class, recess, and class transition periods.

The District will provide resources and links to resources, tools, and technology with ideas for classroom physical activity breaks. Resources and ideas are available through [USDA](#) and the [Alliance for a Healthier Generation](#).

### ***Active Academics***

Teachers will incorporate movement and kinesthetic learning approaches into “core” subject instruction when possible (e.g., science, math, language arts, social studies, and others) and do their part to limit sedentary behavior during the school day.

The District will support classroom teachers incorporating physical activity and kinesthetic learning approaches into core subjects by making background material available on the connections between learning and movement.

Teachers will serve as role models by being physically active alongside the students whenever feasible.

### ***Before and After School Activities***

The District offers opportunities for students to participate in physical activity either before and/or after the school day (or both) through various methods. The District will encourage students to be physically active before and after school by providing clubs, sports, and activities when feasible.

## **V. Other Activities that Promote Student Wellness**

The District will integrate wellness activities across the entire school setting, not just in the cafeteria, other food and beverage venues, and physical activity facilities. The District will coordinate and integrate other initiatives related to physical activity, physical education, nutrition, and other wellness components so all efforts are complementary, not duplicative, and work towards the same set of goals and objectives promoting student well-being, optimal development, and strong educational outcomes.

All efforts related to obtaining federal, state, or association recognition for efforts or grants/funding opportunities for healthy school environments will be coordinated with and complementary to the wellness policy, including but not limited to ensuring the involvement of the DWC

All school-sponsored events will adhere to the wellness policy guidelines. All school-sponsored wellness events will include physical activity and healthy eating opportunities when appropriate.

### ***Community Partnerships***

The District will continue relationships with community partners (e.g., hospitals, universities/colleges, local businesses, SNAP-Ed providers and coordinators, etc.) in support of this wellness policy's implementation. Existing and new community partnerships and sponsorships will be evaluated to ensure that they are consistent with the wellness policy and its goals.

### ***Community Health Promotion and Family Engagement***

The District will promote to parents/caregivers, families, and the general community the benefits of and approaches for healthy eating and physical activity throughout the school year. Families will be informed and invited to participate in school-sponsored activities and will receive information about health promotion efforts.

As described in the "Community Involvement, Outreach, and Communications" subsection, the District will use electronic mechanisms (e.g., email or displaying notices on the district's website), as well as non-electronic mechanisms (e.g., newsletters, presentations to parents, or sending information home to parents), to ensure that all families are actively notified of opportunities to participate in school-sponsored activities and receive information about health promotion efforts.

### ***Staff Wellness and Health Promotion***

The DWC, through the Executive Director, will ensure that the human resources department regularly researches and disseminates wellness resources and performs other functions that support staff wellness.

Schools in the District will implement strategies to support staff in actively promoting and modeling healthy eating, and physical activity behaviors, include ensuring that all staff have an opportunity to take lunch break, provide annual on-site flu vaccination clinics and allow "active time" as appropriate. The District promotes staff member participation in health promotion programs and will support programs for staff members on healthy eating/weight management that are accessible and free or low-cost.

### ***Professional Learning***

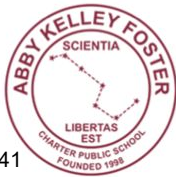
When feasible, the District may offer annual professional learning opportunities and resources for staff to increase knowledge and skills about promoting healthy behaviors in the classroom and school (e.g., increasing the use of kinesthetic teaching approaches or incorporating nutrition lessons into math class). Professional learning will help District staff understand the connections between academics and health and the ways in which health and wellness are integrated into ongoing district reform or academic improvement plans/efforts.

# Abby Kelley Foster Charter School

SEL Data

Fall 2022

Panorama SEL Survey



# The “Why” of Collecting Data

*At AKFCS we are interested in developing not only our student's academic progress, we are interested in our students becoming leaders in our communities, responsible and productive citizens as well as resilient, empathic adults. We understand the value of creating a school environment that is welcoming and where everyone belongs. The surveys provide AKFCS with the data we need to develop interventions from the individual student level to the district and community level.*

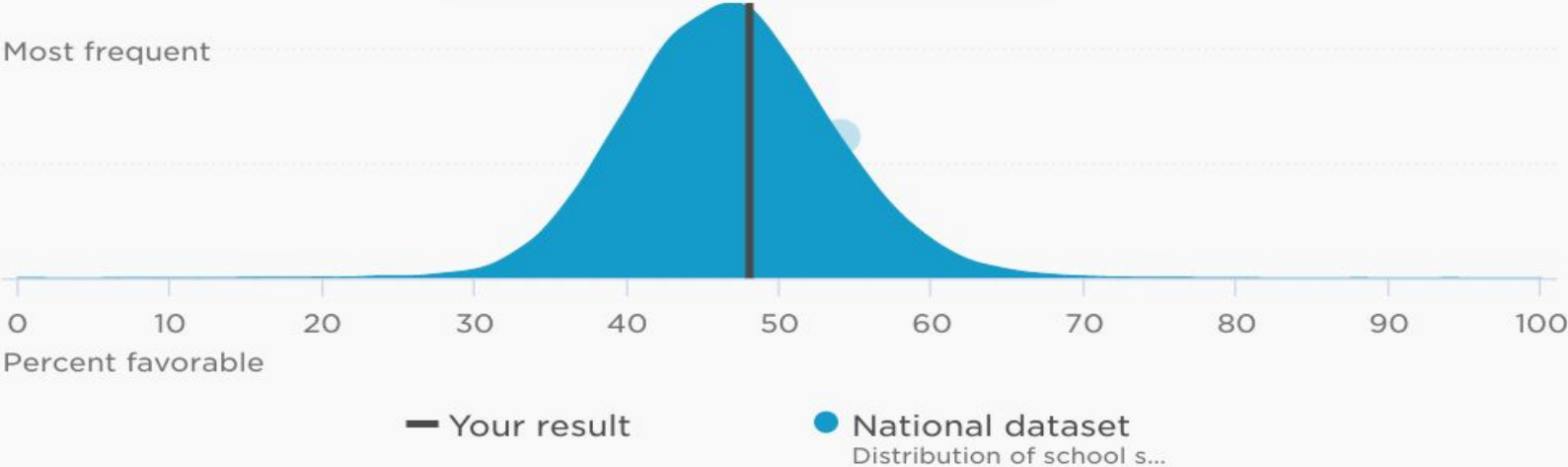
# Emotion Regulation-Grades 3-5

Your result compared to National

**48%**

**Your result**

Compared to schools across the country, your score is near the **60th percentile** on this topic.



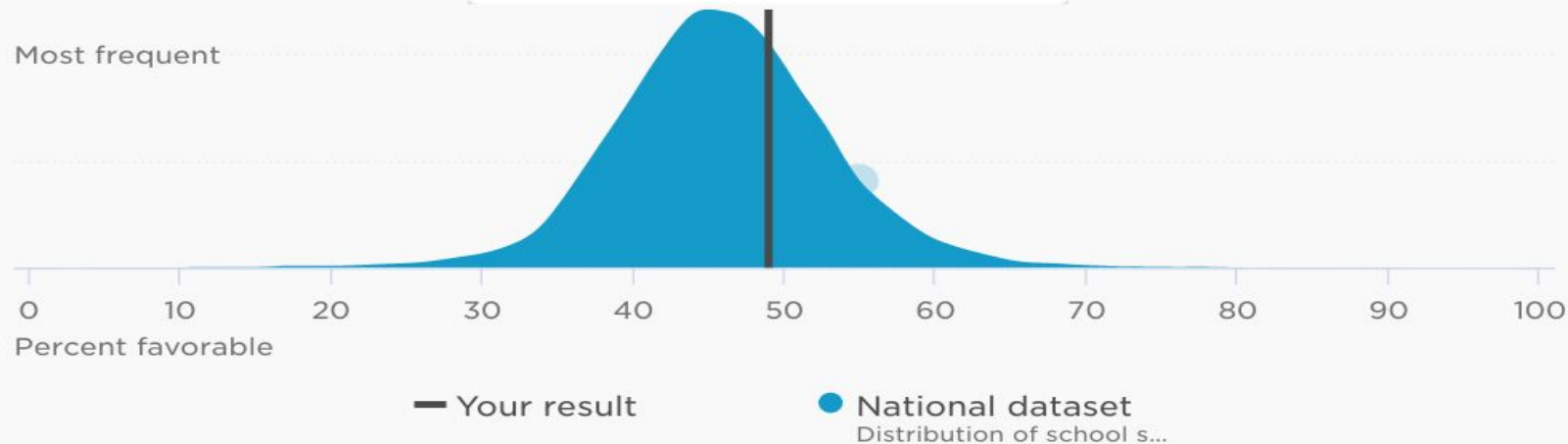
## Emotion Regulation Grades 6-12

### Your result compared to National

**49%**

**Your result**

Compared to schools across the country, your score is near the **70th percentile** on this topic.





## Questions - Emotion Regulation Grade 3-5

QUESTION  
> How often are you able to pull yourself out of a bad mood?

**43 %**   
responded  
favorably



QUESTION  
> When everybody around you gets angry, how relaxed can you stay?

**49 %**   
responded  
favorably



QUESTION  
> How often are you able to control your emotions when you need to?

**55 %**   
responded  
favorably



QUESTION  
> Once you get upset, how often can you get yourself to relax?

**48 %**   
responded  
favorably



QUESTION  
> When things go wrong for you, how calm are you able to stay?

**46 %**   
responded  
favorably



## Emotion Regulation Questions Grades 6-12

### QUESTION

- When you are feeling pressured, how easily can you stay in control?

**48%**   
responded  
favorably

### QUESTION

- How often are you able to pull yourself out of a bad mood?

**40%**   
responded  
favorably

### QUESTION

- When everybody around you gets angry, how relaxed can you stay?

**48%**   
responded  
favorably

## Emotion Regulation Questions Continued Grades 6-12

QUESTION



How often are you able to control your emotions when you need to?

**63%**   
responded  
favorably

QUESTION



Once you get upset, how often can you get yourself to relax?

**51%**   
responded  
favorably

QUESTION



When things go wrong for you, how calm are you able to remain?

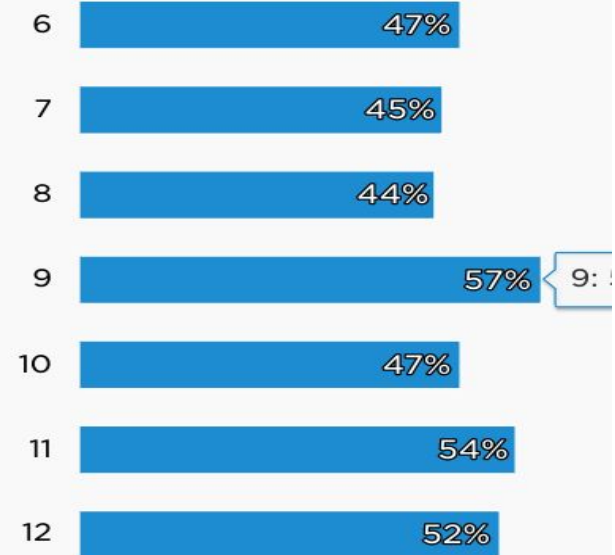
**43%**   
responded  
favorably

# Emotion Regulation By Grades

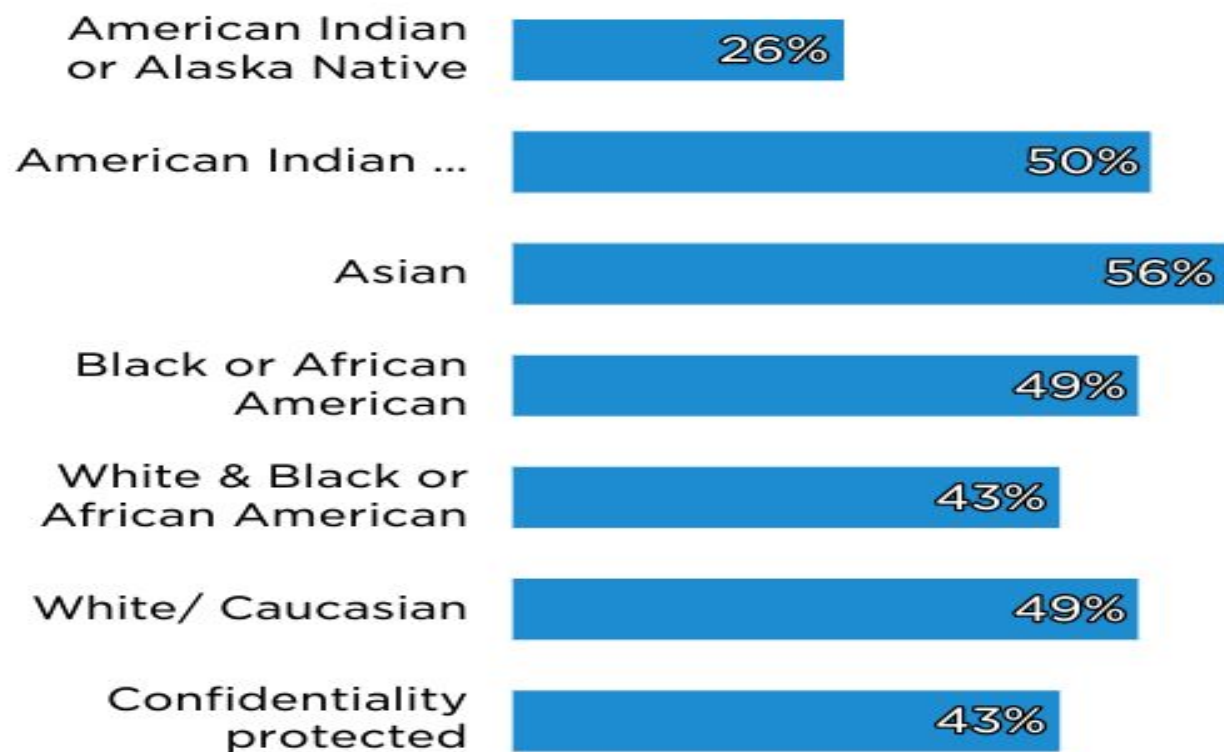
Emotion Regulation Grades 3-5



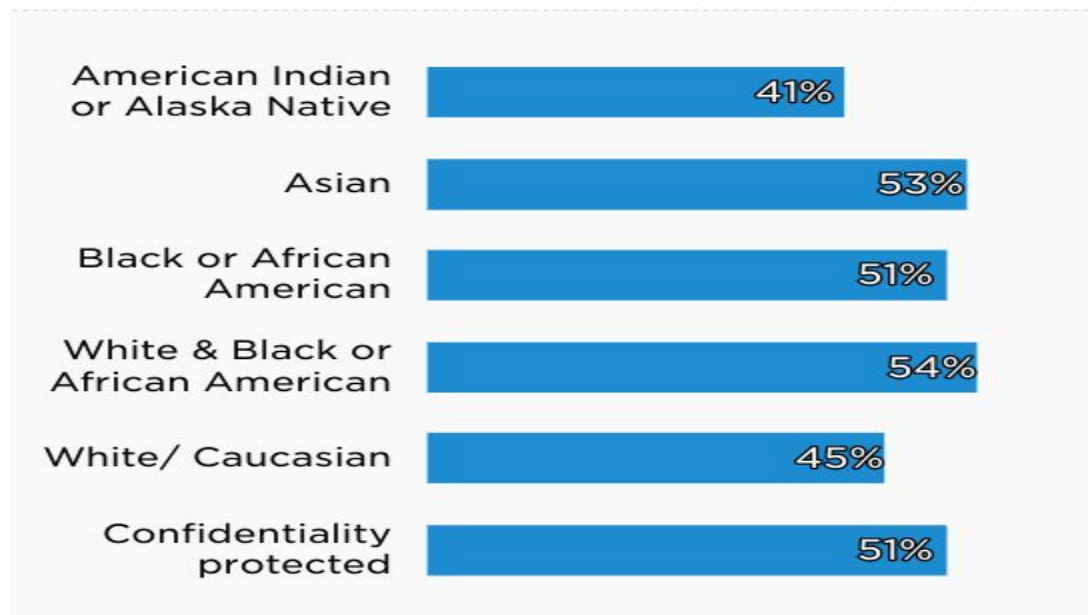
Emotion Regulation Grades 6-12



## Emotion Regulation- by Race/Ethnicity Grades 3-5



## Emotion Regulation Race/Ethnicity Grades 6-12



## Growth Mindset- Grades 3-5

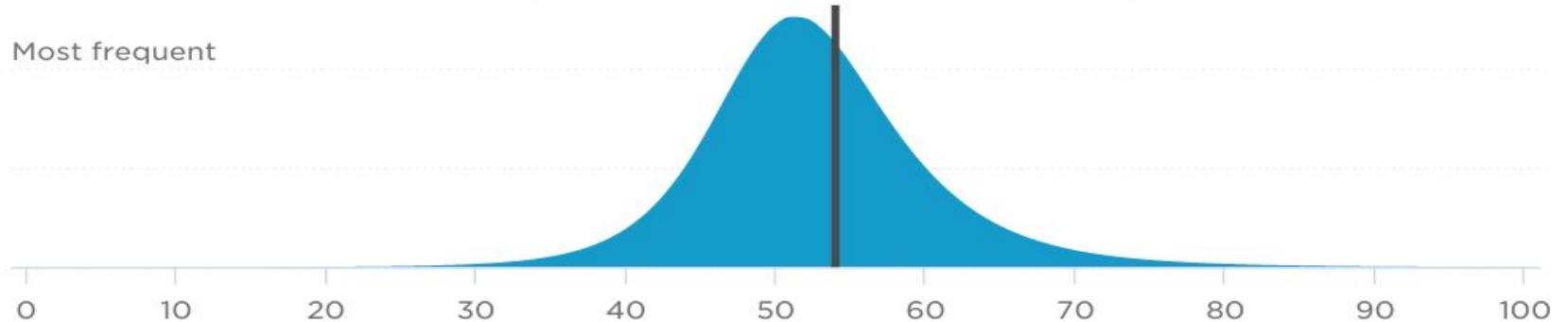
### Your result compared to National

**54%**

**Your result**

Compared to all schools in our national dataset, your score is near the **60th percentile** on this topic.

Most frequent



Percent favorable

— Your result

● National dataset  
Distribution of all scho...



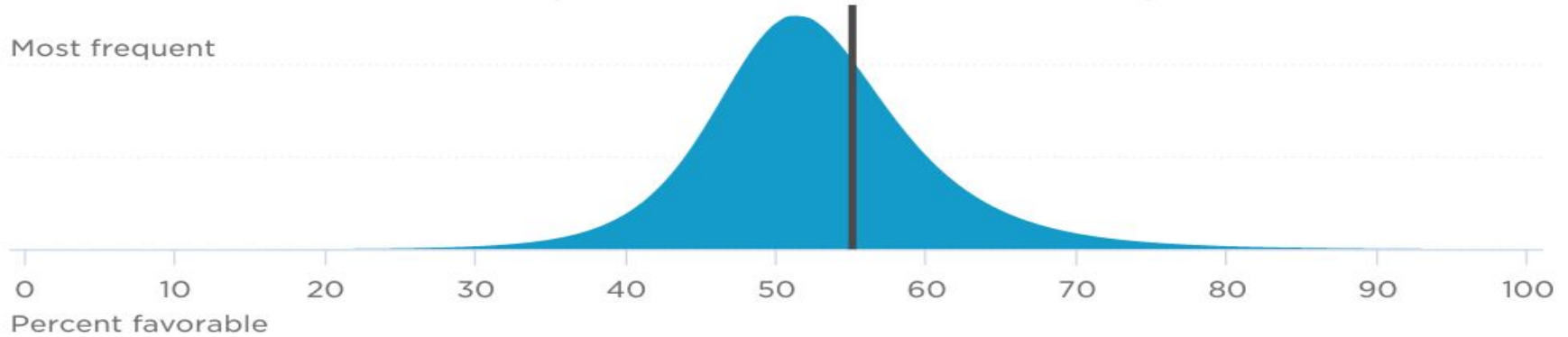
## Growth Mindset Grades 6-12

### Your result compared to National

**55%**

**Your result**

Compared to all schools in our national dataset, your score is near the **70th percentile** on this topic.



— Your result

● National dataset  
Distribution of all scho...

## Growth Mindset Questions Grades 3-5

### QUESTION



In school, how possible is it for you to change: Being talented

**51%** 

responded  
favorably

### QUESTION



In school, how possible is it for you to change: Giving a lot of effort

**59%** 

responded  
favorably

### QUESTION



In school, how possible is it for you to change: Behaving well in class

**62%** 

responded  
favorably

## Growth Mindset Grades 3-5 Continued

### QUESTION



In school, how possible is it for you to change: Liking the subjects you are studying

**42%**   
responded  
favorably

### QUESTION



In school, how possible is it for you to change: How easily you give up

**50%**   
responded  
favorably

### QUESTION



In school, how possible is it for you to change: Your level of intelligence

**61%**   
responded  
favorably

## Growth Mindset Questions Grades 6-12

### QUESTION



In school, how possible is it for you to change: Being talented

**49%** 

responded  
favorably

### QUESTION



In school, how possible is it for you to change: Putting forth a lot of effort

**71%** 

responded  
favorably

### QUESTION



In school, how possible is it for you to change: Behaving well in class

**69%** 

responded  
favorably

## Growth Mindset Questions Continued (Grades 6-12)

### QUESTION

- > In school, how possible is it for you to change: Liking the subject

**34%**   
responded  
favorably

### QUESTION

- > In school, how possible is it for you to change: How easily you give up

**46%**   
responded  
favorably

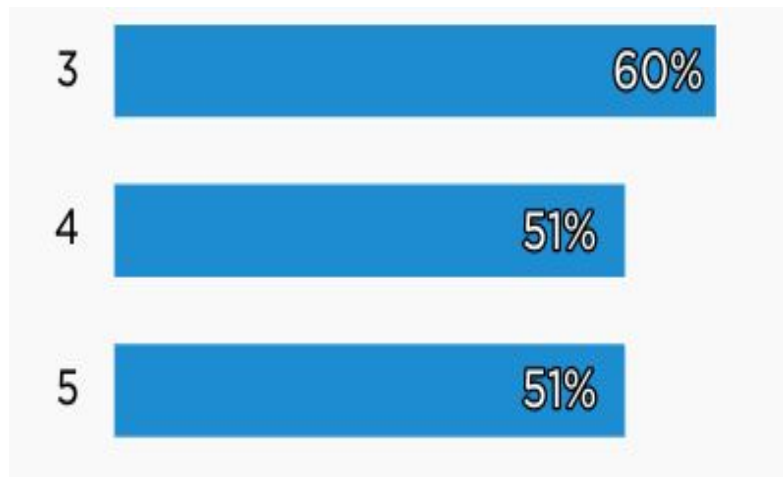
### QUESTION

- > In school, how possible is it for you to change: Your level of intelligence

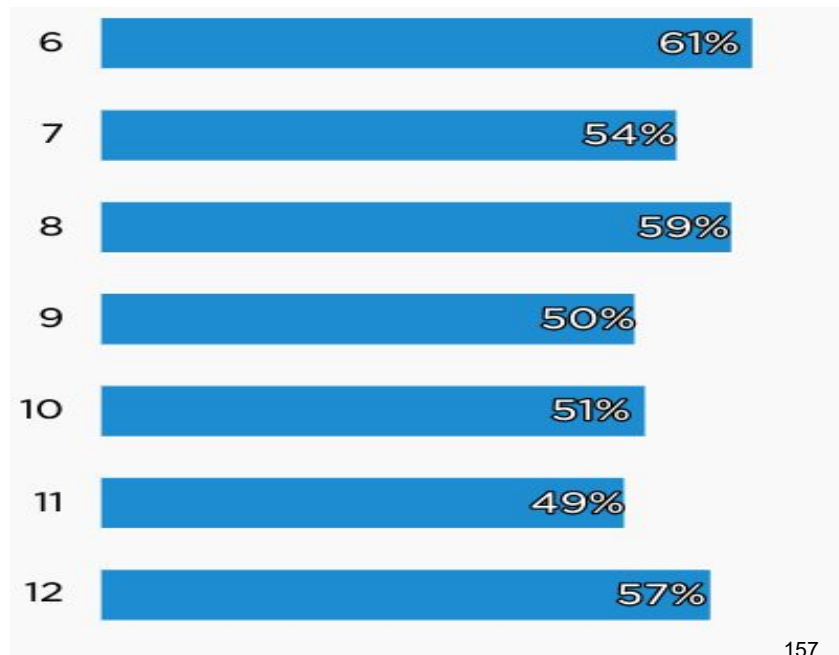
**58%**   
responded  
favorably

## Growth Mindset by Grade

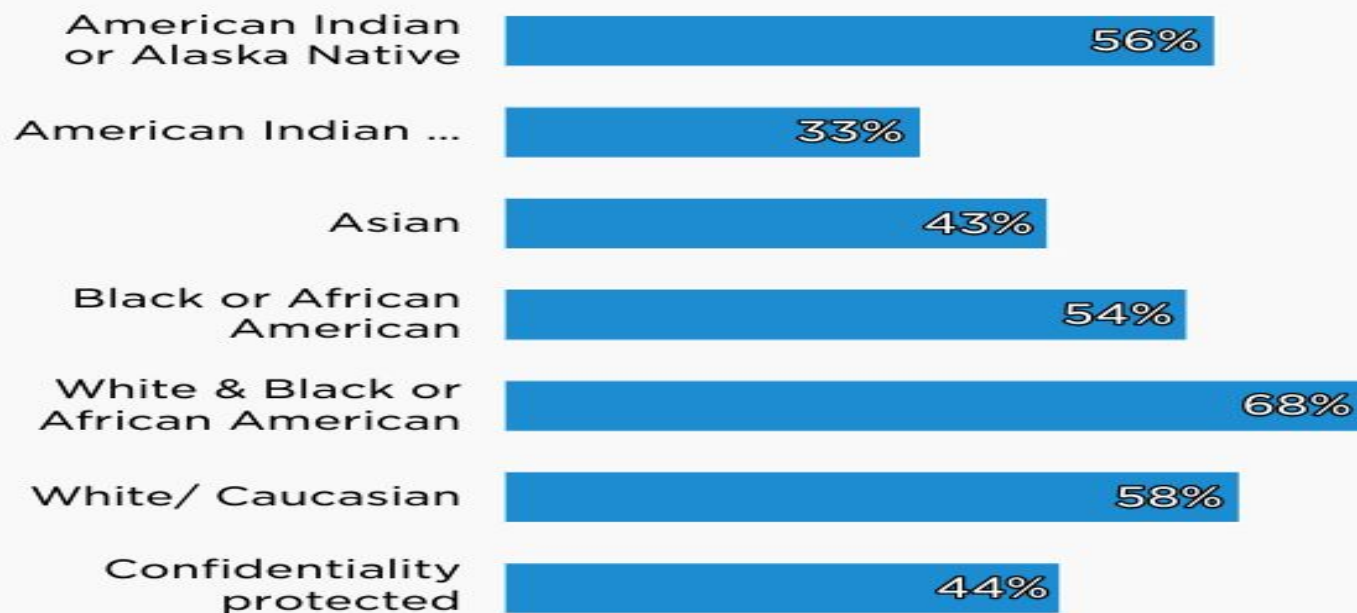
Grades 3-5



Grades 6-12

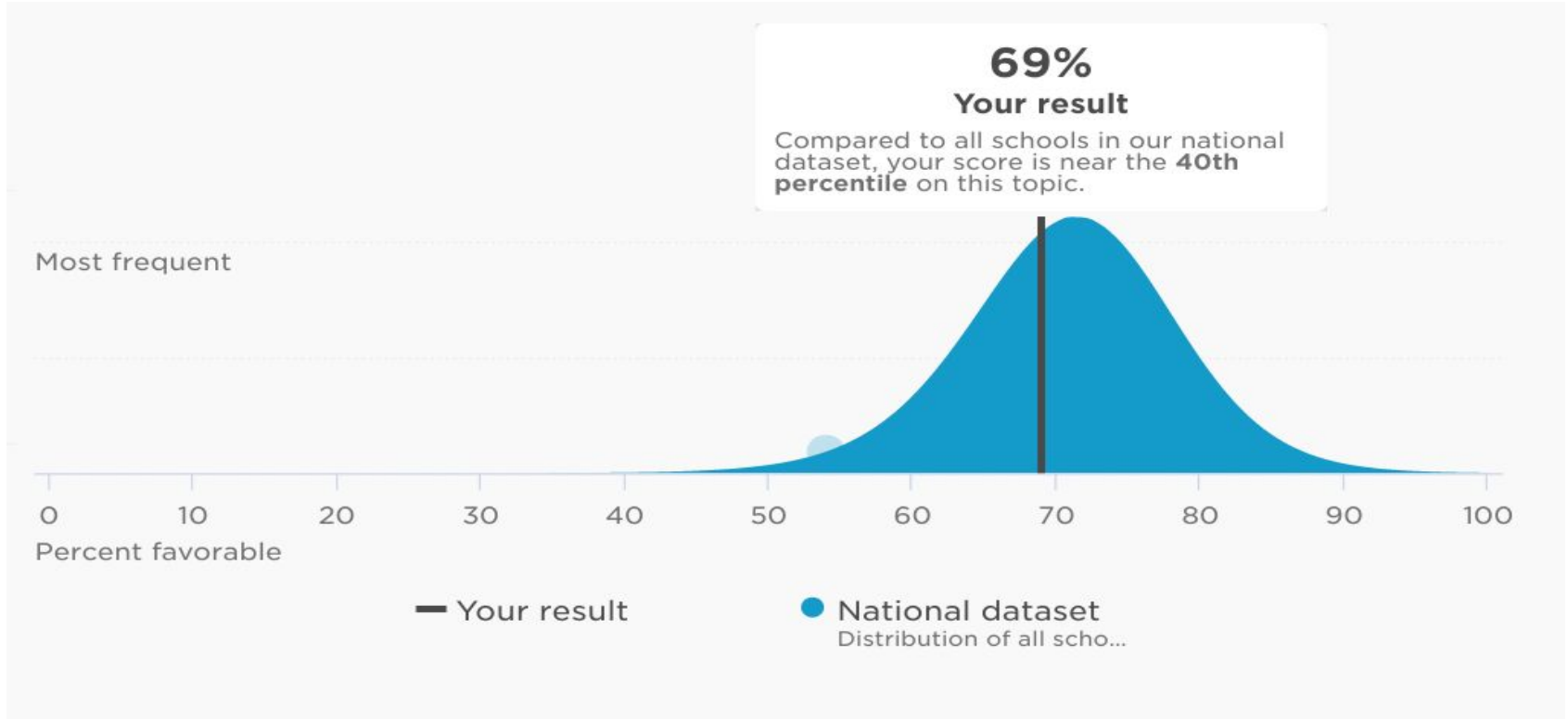


## Growth Mindset Results by Student Race/Ethnicity Grades 3-5



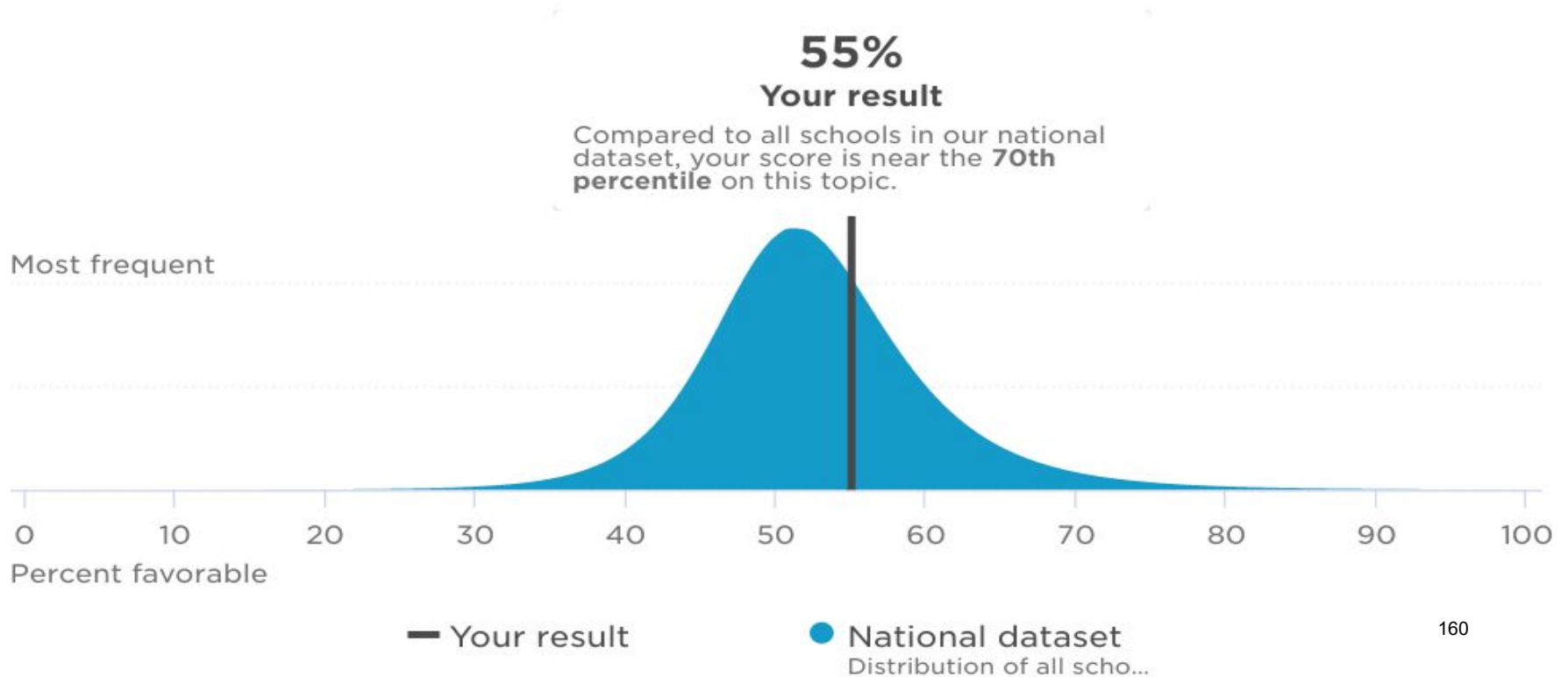


## Self Management Grades 3-5



# Self Management Grades 6-12

## Your result compared to National



## Self Management Questions, Grades 3-5

QUESTION  
➤ During the past 30 days...How often were you polite to adults?

**87 %** ⓘ  
responded favorably

QUESTION  
➤ During the past 30 days...How often did you come to class prepared?

**70 %** ⓘ  
responded favorably

QUESTION  
➤ During the past 30 days...How often did you follow directions in class?

**82 %** ⓘ  
responded favorably

QUESTION  
➤ During the past 30 days...How often did you get your work done right away, instead of waiting until the last minute?

**76 %** ⓘ  
responded favorably

QUESTION  
➤ During the past 30 days...How often did you pay attention and ignore distractions?

**53 %** ⓘ  
responded favorably

## Self Management Questions Continued, Grades 3-5

### QUESTION

- > During the past 30 days...When you were working independently, how often did you stay focused?

**74 %**   
responded  
favorably

### QUESTION

- > During the past 30 days...How often did you remain calm, even when someone was bothering you or saying bad things?

**39 %**   
responded  
favorably

### QUESTION

- > During the past 30 days...How often did you allow others to speak without interrupting them?

**73 %**   
responded  
favorably

### QUESTION

- > During the past 30 days...How often were you polite to other students?

**80 %**   
responded  
favorably

### QUESTION

- > During the past 30 days...How often did you keep your temper under control?

**58 %**   
responded  
favorably

## Self Management Questions Grades 6-12

### QUESTION

- During the past 30 days...How often did you come to class prepared?

**91%**   
responded  
favorably

### QUESTION

- During the past 30 days...How often did you follow directions in class?

**89%**   
responded  
favorably

### QUESTION

- During the past 30 days...How often did you get your work done right away, instead of waiting until the last minute?

**58%**   
responded  
favorably

### QUESTION

- During the past 30 days...How often were you polite to adults?

**91%**   
responded  
favorably

## Self Management Questions Continued Grades 6-12

### QUESTION



During the past 30 days...How often did you pay attention and resist distractions?

**59%** 

responded  
favorably

### QUESTION



During the past 30 days...When you were working independently, how often did you stay focused?

**72%** 

responded  
favorably

### QUESTION



During the past 30 days...How often did you remain calm, even when someone was bothering you or saying bad things?

**50%** 

responded  
favorably

## Self Management Questions Continued Grades 6-12

### QUESTION



During the past 30 days...How often did you allow others to speak without interruption?

**79%**   
responded  
favorably

### QUESTION



During the past 30 days...How often were you polite to other students?

**80%**   
responded  
favorably

### QUESTION



During the past 30 days...How often did you keep your temper in check?

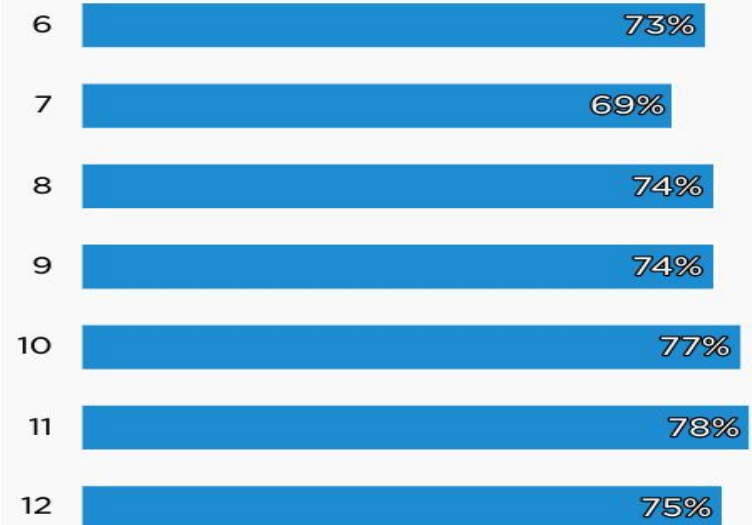
**70%**   
responded  
favorably

## Self Management by Grade

Self Management Grades 3-5

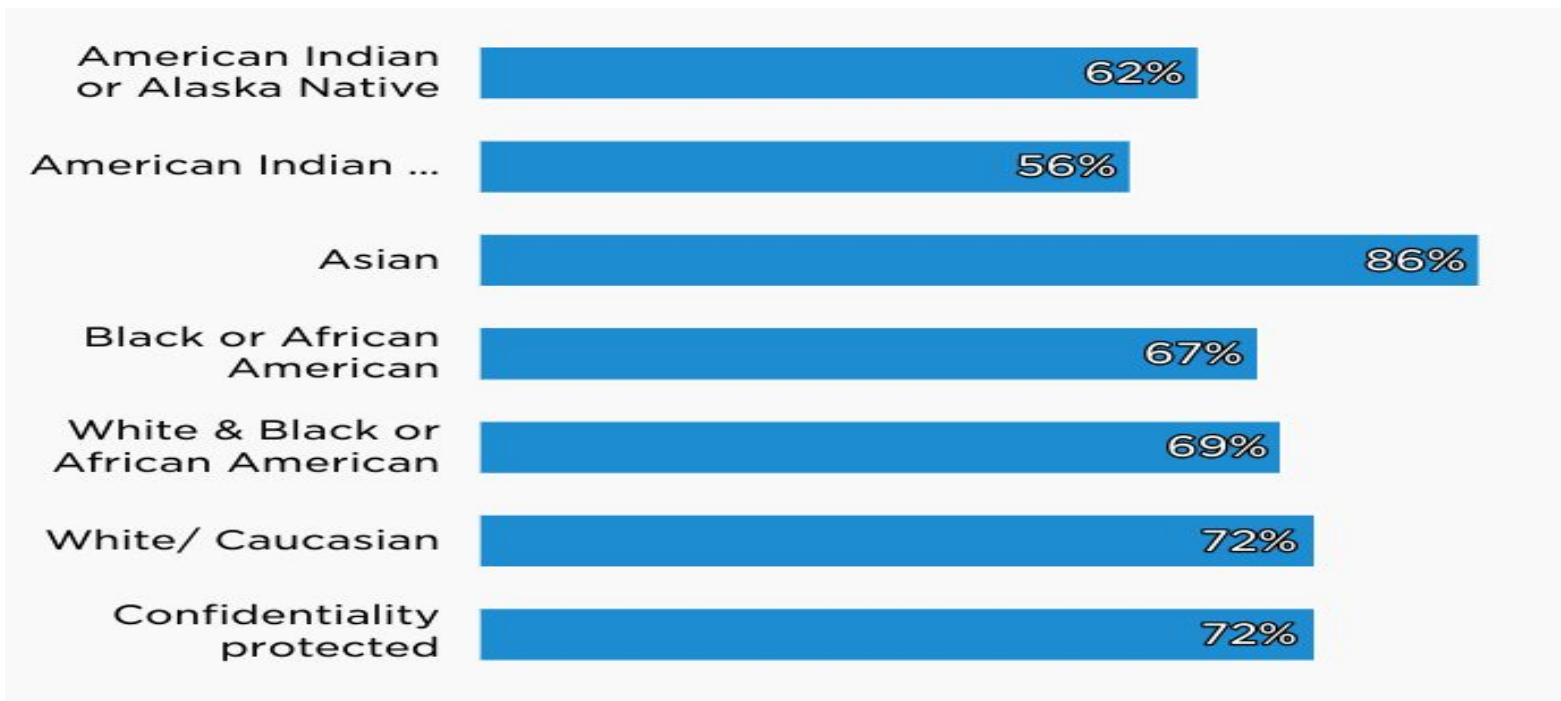


Self Management Grades 6-12





## Self Management by Race/Ethnicity Grades 3-5



## Self Management for Race/Ethnicity Grades 6-12





## Abby Kelley Foster Charter Public School

10 New Bond Street Worcester, MA 01606

Phone: (508) 854-8400 Fax: (508) 854-8484

[www.akfcs.org](http://www.akfcs.org)

### Education Committee Meeting Minutes- DRAFT

Thursday, February 16, 2023, 8:00 a.m.

<https://akfcs-org.zoom.us/j/98647263514?pwd=MHZsNmMkRXFIZjhkdG5GejlQRXhFdz09>

Meeting ID: 986 4726 3514 Passcode: 946445

By phone: 98647263514 Meeting ID: 986 4726 3514

The meeting was called to order by Ms. Amy Vernon, Chair. The attendance was recorded and is attached.

Ms. Vernon requested a motion to approve the December 9, 2022, meeting minutes. The motion was made by Ms. Yarnie and seconded by Ms. Vernon. The minutes were approved unanimously.

### **Charter Renewal**

The Charter Renewal document was received and reviewed, allowing Abby Kelley to correct any errors noted factually. Ms. Paluk explained that the Charter Renewal was scheduled for February 28, 2023, and a decision should be made then. Ms. Veron pointed out an additional area of review, where it was determined that the measures were met in two of the four years when it should be three of the four years. Ms. Yarnie also noted an additional area of correction, stating that the DEI committee was formed to oversee the search for the executive director, citing the need for more to the statement.

### **Fall SEL Data Presentation**

Dr. Cole provided an overview of the SEL data given to grades three through twelve students. Students in grades three through five were near the 60th percentile, and students in grades six through twelve were near the 70th percentile compared to schools across the country, showing that our students are responding favorably to having good emotional regulation skills. It was explained that the confidentiality-protected group would be the students with one or two respondents.

Students were also evaluated on their growth mindset, where students in grades three through five responded favorably, placing them in the 60th percentile compared to the other schools in the national data set for Panorama. Grades six through twelve showed 55% of students responding favorably, placing them in the 70th percentile. Dr. Cole explained that this survey is the voice of the students and their perception of what they think. This information is used to review the current social-emotional curriculum and determine if the students may require more help in some of the presented skills. Winter survey results will show any increases or decreases in skills from the perspective of creating individual interventions. Ms. Vernon noted how well the students were doing compared to the national numbers.

*Abby Kelley Foster Charter Public School does not discriminate on the basis of race, color, sex, gender identity, religion, national origin, sexual orientation, disability, or homelessness and all students have equal access to the general education program and the full range of any occupational/vocational education programs offered by the district.*



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### **Wellness Policy**

The wellness policy is reviewed every three years, and with the review of the nutritional program taking place, some minor changes were made. A wellsat document, which is part of the national lunch program, is used for comparison, and it was noted that the changes made were not dramatically different, making our program up to par. Areas of change included food rewards, celebrations, and physical education. A wellness committee will be formed with students, parents, and teachers to make sure that the policy is following standards.

### **Principal Updates**

#### **High School**

The highest number of students in the last six years have qualified for high honors or honor roll, which was celebrated by them being on the television in the cafeteria. Many invites have been sent to sophomores for the IB program. The national honor society will also see an induction of about 40 juniors and seniors in the spring, with students needing a 3.5 GPA to be invited. Boys basketball has qualified for the state tournament for the first time in school history. Students in the Black Student Union, along with Mr. Gitkind, have created slides depicting well-known people, advancements in society, and youth awareness, along with famous quotes and music, and food.

#### **Middle School**

i-Ready scores have shown that the students have increased their reading scores and math scores. Grade 4 students met or exceeded by 64%, grade 5 by 46%, grade 6 by 50%, and grade 7 by 51%. Math saw students meeting or exceeding in grade 4 by 18%, grade 5 by 32%, grade 6 by 51%, and grade 7 by 43%. Classroom observations are taking place by Ms. Hinds, Mr. Gero, and Ms. Regan. Observations will continue after the February break. It was noted that the vacancies in the middle school had been filled. The students are running Central Perk Cafe in the learning center, and they are learning about expectations for adult foods and OSHA regulations. Middle school students will be attending a dance tonight for grades 6 and 7. March will see different activities read across America and march madness reading challenges. Community reading day and PI day will also be held. Ms. Hinds explained that a small summer program was being created for students and that more information would be provided by April vacation.

#### **Elementary School**

Ms. Gould explained that the students had made more growth at this point than they did last year in literacy. Grades Kindergarten, one, and three saw a 6% increase, and grade two saw a 24% increase. It was also noted that there was a higher number of students reading on or above grade level in grades one through three. Kindergarten scored 80% last year and scored 76% this year. Ms. Gould also highlighted that there are 12% fewer students that are two or more grade levels behind.

Ms. Vernon asked for a motion to adjourn the meeting at 8:45 a.m. Ms. Yarnie made the motion to adjourn, and it was seconded by Ms. Vernon. The committee members voted unanimously to adjourn the meeting.



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