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MEETING NOTICE

POSTED IN ACCORDANCE WITH THE PROVISIONS OF MGL 30A § 20 Act relative to extending certain COVID-19 measures adopted during the state of emergency

Marblehead School Committee Meeting and Budget Hearing

Name of Board or Committee

Address: Marblehead Veteran’s Middle School – Performing Art Center at 217 Pleasant St. Marblehead MA 01945

OR
Zoom Conference join via the web link or Dial in
<https://marbleheadschoools-org.zoom.us/j/99975493631?pwd=Y0pHWVM2YitBZXN0U2ZyTk1OMzh4dz09>
 Meeting ID: 999 7549 3631
 Password: 873255
 Dial in Phone #1 646 931 3860

Thursday	March	21st	2024	6:15 pm
Day of Week	Month	Date	Year	Time

Agenda or Topics to be discussed listed below (That the chair reasonably anticipates will be discussed)

- I. Initial Business
 - a. Call to Order

- II. Motion and vote to meet in executive session pursuant to Massachusetts General Laws chapter 30A section 21(a) for the following purpose:
 - Purpose (3) to discuss strategy with respect to and in preparation for collective bargaining with the Marblehead Education Association Unit A, Unit Permanent Substitutes, Unit Tutors, Unit Paraprofessionals, and Unit Custodians because an open discussion may have a detrimental effect on the bargaining position of the Committee.

Executive Session Agenda:

- I. Strategy discussion with respect to and in in preparation for collective bargaining with the Marblehead Education Association Unit A, Unit Permanent Substitutes, Unit Tutors, Unit Paraprofessionals, and Unit Custodians

- III. Return to Open Session 7 pm

- IV. Student Representative

- V. Budget Presentation of Proposed Budget Options for FY25

- VI. Budget Public Hearing on Presentation of Proposed Budget Options for FY25

- VII. Consent Action and Agenda Items
 - a. Schedule of Bills
 - b. Approval of Minutes

(Vote)
 (Vote)

VIII. School Committee Communication and Discussion Items

a. Approval of Overnight Field Trips

i. DECA

ii. Music Department trip to Ireland April 2025

iii. Trip to Spain February 2025

iv. Trip to France April 2025

b. Student Opportunities Act Approval

(Vote)

(Vote)

(Vote)

(Vote)

(Vote)

IX. Closing Business

a. New Business- School Committee Announcements and Requests

b. Correspondence

c. Adjournment

Hybrid Meeting Notice: Members of the public are welcome to attend this in-person at 217 Pleasant St. Marblehead MA 01945 or by the remote zoom connection provided. Please note that the in-person meeting will not be suspended or terminated if technological problems interrupt the remote connection.

THIS AGENDA IS SUBJECT TO CHANGE

Chairperson: Sarah Fox
Posted by: Sarah Fox
Date: 3/21/2024



Marblehead Public Schools

FY25 Superintendent's Preliminary Budget School Committee Meeting - Budget Hearing

March 21, 2024

Dr. Theresa McGuinness, Interim Superintendent of Schools
Michelle Cresta, Assistant Superintendent of Finance & Operations
Mary DeLai, Interim Director of Finance & Operations (*Contracted*)
Patricia Bell, Interim Director of Student Services

(February 28, 2024 School Committee Budget Workshop - [Superintendent's FY25 Preliminary Budget](#))

Foundational Budget Levers

Level & Reduced Services

District, Schools, Departments

DISTRICTWIDE

- Directives/Goals
- Priorities
- Drivers
- Enrollment
- Salary Grids
- Staffing Accountability
- Out of District Tuition & Transportation

LEVEL & REDUCED SERVICES

- Level Services
- Reduced Services Methodology
- Reduced Services
- Allocation by Cost Center
- Allocation by Cost Function
- Budget Levels
- Total Budget by Function
- Offsets & Grants
- Capital Improvements

TWO BUDGETS

- Athletics - *User Fee Options*
- Total Reductions
- Efficiencies & Reductions
- Hotel and/or Meals Tax
- Next steps
- Our 'Why?'**



FY25 - Budget Directives/Goals

- Justification of the building budgets for FY25 must be based upon projected enrollments and curricular needs.
- Building principals and directors identified *essential* services for all students.
- **'Staffing Accountability Report'** - Provides a more in-depth review of staffing by school (*Addendum*)
- Sustain the appropriate staffing levels and programs to **support students' social, emotional, and behavioral health** as our students continue to grapple with the effects of the pandemic.
- Examine revenue streams other than the operating budget, i.e. federal and state grant opportunities, & *user fees*.
- Continue budget development discussions with Town officials, the Finance Committee, and the Select Board through the Town/School Budget Subcommittee.



FY25 Budget Priorities

Framework: *Meeting the needs of ALL students*

Multi Tiered System of Support (MTSS): Academic, Social-Emotional, & Behavioral

Challenge students with rigorous instruction while providing appropriate levels of support for all, in safe and welcoming school buildings

Plan for Success 'Strategic Objectives' including maintaining existing programs that support students

Cultivate Belonging & Social-emotional Wellness in Inclusive Classrooms

Using Data Based Decision-Making

Ensuring a Consistent & Aligned Curriculum

Culturally Responsive Teaching & Practices

Meet Legal Mandates for Special Education



Budget Drivers

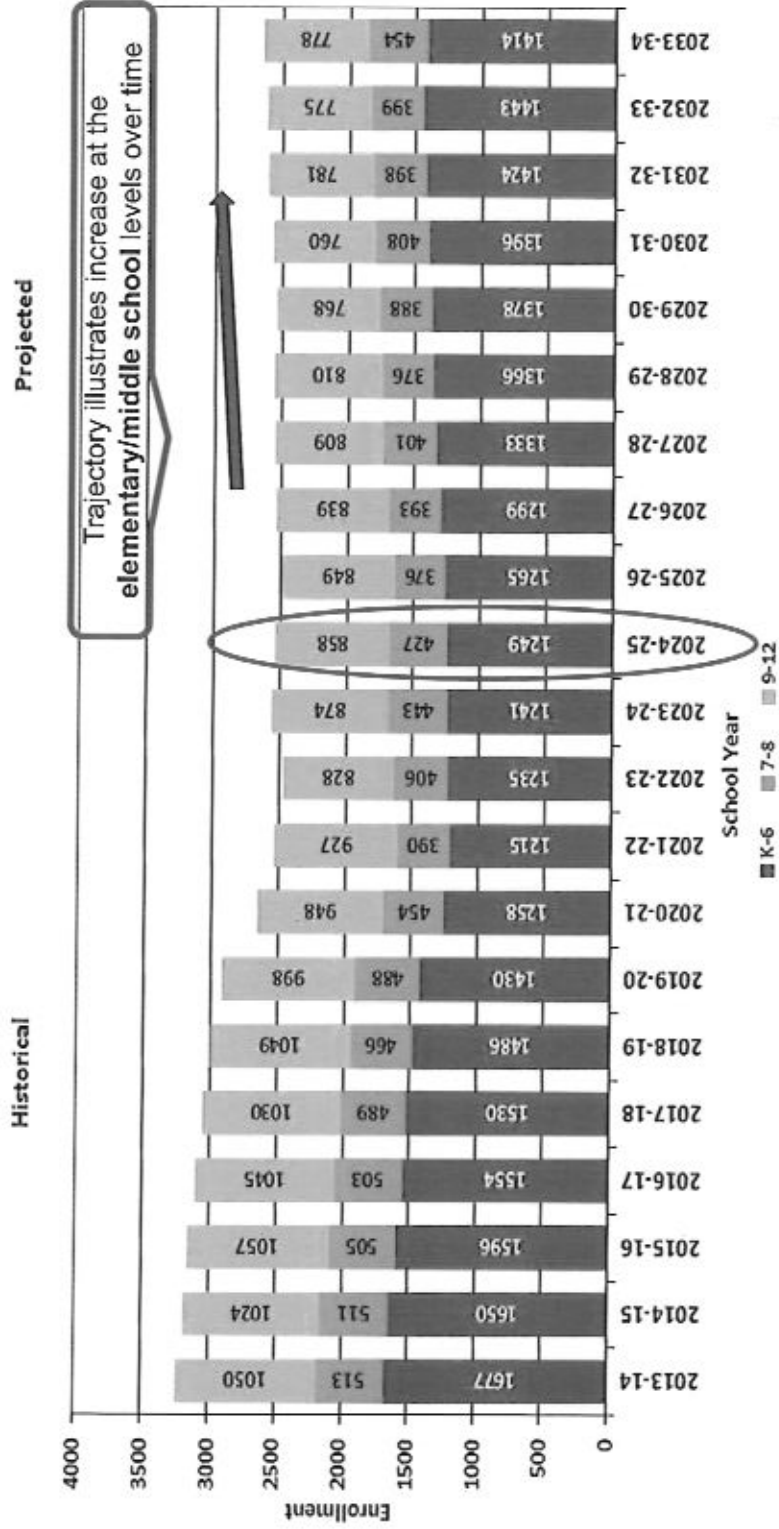
***Unknown Variable: *Contract Negotiations*

- Student Enrollment & Need**
- Staffing:** Salary Increased Due to Forecasted Contractual Obligations, Including Step & Cost-of-Living Increases
- Operations & Maintenance:** Service Contracts, Facility Needs, Supply & Equipment Needs, Utilities
- Special Education Services:** Out of District Tuition, Transportation
- Fluctuations in Outside Revenue Sources:** User fees, grants
- Reduced Appropriation from the Town**



NESDEC Enrollment Projections

Historical & Projected Enrollments in Grade Combinations





Elementary Enrollment, PreK - 6

FY24 Actual									
FY24 Actual	PK	K	1	2	3	4	5	6	Total
Brown	33	106	99	101	106	x	x	x	445
Glover	33	60	87	70	77	x	x	x	327
Village	x	x	x	x	x	187	171	179	537

Classrooms									
FY24 FTE	PK	K	1	2	3	4	5	6	Total
Brown	3	5	5	5	5	x	x	x	23
Glover	3	4	4	4	4	x	x	x	19
Village	x	x	x	x	x	9	8	10	27

Class Size								
FY24	PK	K	1	2	3	4	5	6
Brown	11	21.2	19.8	20.2	21.2	x	x	x
Glover	11	15	21.8	17.5	19.3	x	x	x
Village	x	x	x	x	x	21	21.4	18

Example

FY25 @Brown School = 454 students in 23 classrooms w/average class size of 19.7
 SC Policy Average Class Size ~25 students

FY25 Projected									
FY25 Projected	PK	K	1	2	3	4	5	6	Total
Brown	35	110	108	100	101	x	x	x	454
Glover	28	65	66	90	73	x	x	x	322
Village		x	x	x	x	184	188	171	543

Classrooms									
FY25 FTE	PK	K	1	2	3	4	5	6	Total
Brown	3	5	5	5	5	x	x	x	23
Glover	3	4	3	4	4	x	x	x	18
Village		x	x	x	x	9	8	8	25

Class Size								
FY25	PK	K	1	2	3	4	5	6
Brown	11.6	22.0	21.6	20.0	20.2	x	x	x
Glover	9.3	16.3	22.0	22.5	18.3	x	x	x
Village	x	x	x	x	x	20.4	23.5	21.4

M Budget Driver - Salary Grid

Unit A % Increase as Staff Move through Steps

Per collective bargaining agreements staff move vertically through steps upon the conclusion of a year of service

		% Increase Over Previous Step										
		LANE / COLUMN										
		B	B9	B21	B30	M	M15	M30	M45	M60	M75	
STEP	1											
	2	4.59%	4.52%	4.48%	4.45%	4.43%	4.33%	4.47%	4.38%	4.35%	4.26%	
	3	4.64%	4.67%	4.69%	4.70%	4.70%	4.61%	4.35%	4.29%	4.18%	4.09%	
	4	4.26%	4.30%	4.33%	4.35%	4.36%	4.28%	4.21%	4.11%	4.06%	3.99%	
	5	4.19%	4.19%	4.19%	4.20%	4.20%	4.12%	4.05%	3.99%	3.93%	3.86%	
	6	4.06%	4.03%	4.00%	3.98%	3.97%	3.90%	3.83%	3.78%	3.72%	3.66%	
	7	4.24%	4.07%	3.91%	3.85%	3.78%	3.71%	3.68%	3.62%	3.56%	3.50%	
	8	4.86%	4.57%	4.30%	4.17%	4.04%	3.97%	3.94%	3.86%	3.81%	3.74%	
	9	8.49%	7.16%	5.91%	5.11%	4.33%	4.26%	4.17%	4.10%	4.06%	4.00%	
	10					4.07%	4.03%	3.99%	3.92%	3.88%	3.82%	
	11					8.18%	8.10%	8.05%	7.99%	7.91%	7.79%	



Budget Driver - FY24 Unit A Staffing

		Unit A Staff FTE by Lane and Step										
		LANE / COLUMN										
	STEP	B	B9	B21	B30	M	M15	M30	M45	M60	M75	
	1	0	0	0	0	0	0	0	0	0	0	0
	2	3	0	0	0	0	6.8	1	0	0	0	0
	3	3	0	0	0	0	12.1	0	0	0	0	0
	4	3	0	0	0	0	13	0	0	0	0	1
	5	0	0	0	0	0	8	0	0	0	0	0
	6	1	0	0	0	0	4.7	0	0	0	0	1
	7	2	0	0	0	0	7	0	2	0	0	0
	8	0.8	0	0	0	0	3	4	2	1	0	0
	9	6	0	0	0	3	14.1	1.6	1	0	0	1
	10	0	0	0	0	0	3	3	3	0	0	0
	11	0	0	0	0	0	42.6	33	33.6	23	23	34.8



Staffing Accountability Report

Process: Calculating Staff Time with Students...*Not a Science*

To determine the correct staffing to meet the service delivery prescribed by IEPs, the Principals and Team Chairs closely collaborate each spring. There is significant **variation** in the scheduling, hours, needs, and positions at all three levels (*elementary, middle, high*).

The closest **estimate** based on Principal + Team Chair information uses these formulas to determine staff hours available to deliver student services:

Elementary educators	4.75 / 6.25 hours per day
Middle school educators	5 / 6.5 hours per day
High school educators	5 / 6.5 hours per day
Tutors + Paras	5.5 / 6.5 hours per day



★ [Link to the Full Report](#)

Staffing Accountability Report

Current Service Grids 10/1/23 to Present

Service delivery models include: Delivering support and instruction in general classes, in co-taught general education classes, or in groups of 4-8 students during an instructional block, small group instruction, or 1:1 services. This in addition to, consultation between and among staff to support the sharing of best practices and needed conferring for individual students.

Intervention models: Determined by the student's IEP Team, consisting of highly trained general and special educators, trained tutors, and related service providers. Students' individualized programs are designed to help children access and make effective progress on the state's curriculum standards, and social-emotional development.

Type of Service	A Grid Consultation Time	B Grid in General Education	C Grid in Special Education Setting	Total Hours of Service Required/week
*Reading	0	NA	*340.92	340.92
Counseling	10.1	5.3	68.65	84.05
Speech/ Language	5.36	22.98	151.45	179.79
Occupational Therapy	3.75	44.4	85.35	133.5
Physical Therapy	1.25	24.26	59.95	85.46
BCBA/Behavior Specialist	33.25	0	0	33.25

This table reflects the current hours of services being delivered in: (A) Consultation, (B) General Education setting, and (C) Special Education settings. (Reading is taught by several providers.)



Staffing Accountability Report

Summary of Specialists & Student IEP Services (in hours)

Staffing in the different service categories (reading, mental health, PT/OT, SLP, BCBA) includes multiple settings and programmatic differences of delivery. **It is difficult to illustrate the breadth of such roles in a slide.**

- **Counseling services** include general education interventions, Tier I and Tier II.
- **Related Services**, OT, PT and SLP services, include early intervention & modeling in classrooms.
- **BCBA** hours are all recorded in the A Grid and include consultation, as dictated by the roles their job description entails.

Service on IEP Grids Compared to Staffing, PreK - 12				
Services	Hours on IEPs/Week	Hours of Staff Time/Week	Number of FTEs	
*Reading	340.92	X (Requires explanation)	X	
Counseling/Mental Health	84.05	629.5	26	
Speech/Language	179.79	194.75	8.2	
Occupational Therapy	133.5	142.5	6	
Physical Therapy	85.46	71.25	3	
BCBA (A Grid only - Consults)	33.25	47.5	2	

Out of District Tuition

Overall projected FY25 Tuitions = \$4,403,064

- ❑ Is a total increase of \$687,790 (18.5%) increase over FY24, and an increase to the operational budget of \$448,607 (18.3%)
- ❑ Increased tuitions reflect the *OSD anticipated rate increase **4.69%**
 - **FY25 anticipating 46 students to be in Out of District placements**
 - **FY24 currently have 42 students in Out of District placements**

Budget Offsets:

- ❑ State “Circuit Breaker” FY24 Reimbursement: \$1,418,183
- ❑ Special Education Tuition-In Estimated Offset: \$90,000

*Operational Services Division (OSD) is responsible for setting tuition prices for more than 200 approved special education programs

FY25 Budget - Level Services

Level Services Budget Request

- \$47,423,851 → Represents an increase of **\$2,586,578 or 5.77%**

Major Drivers:

Wages (Steps and COLAs)	\$927,945
Out of District Tuitions	\$448,607
Out of District Transportation	\$409,154
Utilities	\$487,646
Less: Transfer funding	(\$400,000)
IT Hardware Equipment	\$420,000
Other Various (Net Changes)	<u>\$293,226</u>
Total Increase	\$2,586,578



FY25 Reduced Services Budget

Methodology

Tiered Decision-Making

First Tier: Administrative and Operational Efficiency

1. Professional Development
2. Transportation

Second Tier: Extracurricular Programs

1. Extracurricular Programs

Third Tier: Educational Programs and Classroom Resources

1. Curriculum Purchases
2. Instructional Materials and Supplies
3. Technology
4. High School Courses

Fourth Tier: Human Resources (The School Department budget is 80% salaries/wages.)

1. Staffing Group A: Leadership / Administrative and Other Positions
2. Staffing Group B: Support Staff
3. Staffing Group C: Professional Staff Positions that are not Classroom Teachers
4. Staffing Group D: Instructional Staff

***MPS new FY25 Non-Override Budget Methodology (in full)**

FY25 Budget - *Reduced Services

*Insufficient Town Revenue to Support a Level Services Budget

Reduced Services Budget

- \$45,592,667 → Represents an increase of **\$755,394 or 1.68%**

Increase of *\$755,394 over FY24 funding (\$44,837,273 + \$755,394)

*The Town Finance Department worked diligently to project the increased revenues for FY25 and allocated 50% of those revenues to the District, which is equivalent to **\$755,394.**



FY25 Reduced Services

Reductions/Eliminations			
Classroom Teachers	(169,988)	Unemployment	400,000
Special Education Teachers	(202,933)	Professional Development	(30,380)
Adjustment Counselors	(111,911)	Instructional Supplies	(177,908)
EL Teacher	(70,574)	Contracted Services	(37,000)
Reading Teachers	(144,276)	Equipment Replacement	(158,828)
BCBA	(54,870)	Maintenance & Custodial Supplies	(42,000)
General Education Support Staff (para/tutor)	(98,026)	Telephone	(6,000)
7-D Driver	(17,861)	After Dark Program Offering	(48,000)
Facilities Staff	(58,188)		
Assistant Director of Student Services	(80,618)	Funded Through Other Means	
MVMS Assistant Principal	(81,619)	Food Service Director	(75,789)
Clerical/Administrative Support Positions	(126,583)	Extracurricular and Athletic Stipends	(281,210)
Lunch Supervision (para)	(12,993)		
Special Education Support Staff (para/tutor)	(47,014)	Total Reductions/Eliminations from	
Elementary Teacher Leader Positions	(96,615)	Operating Budget	(1,831,184)



Districtwide Summary of Identified

Efficiencies &/or Reductions - Preliminary

- Consolidation of the Therapeutic Program to Brown School
- ****Reductions in Staffing: 36 Positions; 28 Total FTEs

Position	Count of Positions	Position	Count of Positions
Classroom Teachers	4	7-D Driver	1
Special Education Teachers	4	Facilities Staff	2
Adjustment Counselors	2	Assistant Director of Student Services	1
EL Teacher	1	MVMS Assistant Principal	1
Reading Teachers	2	Clerical/Administrative Support Positions	5
BCBA	1	Lunch Supervision (para)	4
General Education Support Staff (para/tutor)	5	Special Education Support Staff (para/tutor)	3
		Proposed Total Positions Reduced	36

- Transfer of **Partial Funding for Athletics** and Extracurriculars to Participants
- Elimination of **Teacher Leaders** at the Elementary Level
- Significant decrease in **Professional Development** funding
- Significant decrease in **Instructional Supplies**



Proposed FY25 Reductions

Tracking Sheet

Change	Adjustment Amount	Running Total FY25 Budget
FY25 Initial Budget Request - Level Services		\$ 47,423,851
Positions Proposed to be Reduced/Eliminated	\$ (1,449,858)	
Increase Unemployment Offset to Reduced/Eliminated Positions	\$ 400,000	
Fund Extracurricular & Athletic Stipends by User Fees	\$ (281,210)	
Reduced Professional Development	\$ (30,380)	
Reduced Instructional Supplies	\$ (177,908)	
Reduced Contracted Services	\$ (37,000)	
Reduced Equipment Replacement	\$ (158,828)	
Reduced Maintenance & Custodial Supplies	\$ (42,000)	
Reduced Telephone	\$ (6,000)	
Reduced After Dark Program Offering	\$ (48,000)	
Changes to Date		→
Running Total	\$ (1,831,184)	\$ 45,592,667



Overall FY25 Budget by Cost Center

	FY22 Actual		FY23 Actual		FY24 Budget		FY25 Level Services Budget		FY25 Reduced Services Budget	
Administration	1,337,485	1,482,852	1,404,767	1,638,179	1,571,385					
Instructional Leadership	3,028,850	3,046,467	3,191,797	3,308,449	3,026,540					
Teachers	20,987,247	20,977,567	22,136,541	22,647,175	22,201,762					
Other Teaching Services	4,245,459	4,416,597	4,798,487	5,131,156	4,836,779					
Professional Development	100,951	106,848	141,272	125,412	91,032					
Instructional Materials, Equipment and Technology	822,569	1,526,444	909,009	938,148	734,565					
Guidance, Counseling and Testing	2,056,614	2,232,641	2,449,994	2,445,868	2,299,019					
Pupil Services	1,156,304	1,408,553	1,493,575	1,924,491	1,799,004					
Athletics & Other Student Activities	828,725	865,444	862,263	951,892	618,854					
Operations and Maintenance	3,053,243	3,548,922	3,149,794	3,682,493	3,431,139					
Utilities	924,794	969,796	1,311,000	1,398,646	1,398,646					
Benefits and Fixed Charges	202,662	270,547	530,500	237,061	637,061					
Out of District Tuitions	3,175,213	3,129,593	2,458,274	2,994,881	2,946,881					
Grand Total	41,920,116	43,982,271	44,837,273	47,423,851	45,592,667					
Budget Transfers from Town										
Benefits and Fixed Charges				542,191	516,444					
Utilities				400,000	400,000					
Grand Total	41,920,116	43,982,271	44,837,273	48,366,042	46,509,111					

M FY25 Total Budget by Function

	FY22 Actual Expended	FY23 Actual Expended	FY24 Adopted Budget	FY25 Level Services Budget	FY25 Reduced Services Budget	\$ Change Between FY25 Level Services & FY24 Adopted	% Change Between FY25 Level Services & FY24 Adopted	\$ Change Between FY25 Reduced Services & FY25 Level Services	% Change Between FY25 Reduced Services & FY25 Level Services
Salary & Wages	34,516,420	35,284,954	37,503,287	38,431,233	37,100,165	927,945	2.47%	(1,331,068)	-3.46%
Supplies & Materials	646,313	1,057,369	1,194,665	1,246,735	1,028,499	52,070	4.36%	(218,236)	-17.50%
Contracted Services	1,295,454	1,305,334	1,327,030	1,382,004	1,317,279	54,974	4.14%	(84,725)	-4.68%
Equipment	655,503	1,359,932	267,960	726,371	569,871	458,411	171.07%	(156,500)	-21.55%
Out of District Costs	3,677,259	3,698,932	2,926,274	3,784,035	3,784,035	857,761	29.31%	-	0.00%
Utilities	924,794	969,796	1,311,000	1,398,646	1,398,646	87,646	6.69%	-	0.00%
Other Expense	204,372	305,954	307,057	454,827	394,172	147,770	48.12%	(60,655)	-13.34%
School Department Sub Total	41,920,116	43,982,271	44,837,273	47,423,851	45,592,668	2,586,578	5.77%	(1,831,183)	-3.86%

Budget Transfers from Town

Salary & Wages	516,444								
Utilities	400,000								
Grand Total	41,920,116	43,982,271	44,837,273	48,366,042	46,509,112	3,528,769	7.87%	(1,856,930)	-3.84%
								1,671,838	3.73%

In FY25, the Town is transferring budget funding for school department Medicare Payroll Tax, Energy and Utility Reserve budgets to the school department from the Town side of the budget. **This is strictly an accounting change in reporting and is not new funding to the Town or School District.**

The FY25 Preliminary Reduced Services Budget as summarized above, includes proposed budget reductions identified by School and District Leadership. These will be reviewed by School Committee for feedback and are subject to change during budget deliberations.



Budget Offsets

- **A revolving fund** separately accounts for specific revenues and earmarks them for expenditure without appropriation for particular purposes to support the activity, program, or service that generated the revenues.
- **Sound financial practice** encourages carry forward reserves of one year of revenue and advises against budgeting for expenditure beyond the carry forward reserve amount for the upcoming year.
- **In a reduced services budget**, extracurricular activity/athletic stipends will be fully funded *through user fees* paid by program participants (v. the general fund)

Fund	Function	FY 24-Adopted	FY 25 Level	FY 25 Reduced
		Budget	Services Budget	Services Budget
User Fees	Extra curricular Stipends	247,905	271,070	552,280
Circuit Breaker	Out of District Special Education Tuitions	1,169,000	1,418,183	1,418,183
Special Education Revolving Fund	Out of District Special Education Tuitions	100,000	90,000	90,000
IDEA Special Education Grant	Out of District Special Education Transportation	400,000	425,000	425,000
Guidance Services Fees	Guidance Software	4,380	4,380	4,380
Building Revolving Fund	Building Improvements, Maintenance	110,000	110,000	133,000
PreK/Kindergarten Tuition	Teachers and support staff	225,421	236,767	236,767
School Lunch Revolving Fund*	School Breakfast/Lunch Program			99,450
		2,256,706	2,555,400	2,959,060

* The School Lunch fund is a self-sustaining revolving fund. Costs allocated to this fund must support the operation or improvement of the food service. **In a reduced services budget the salary of the Food Service Director will additionally be allocated to this fund.** Federal regulations prohibit carrying forward a full year's revenue in this fund.



Federal, State and Private Grants

Grant Name	Funding Agency	FY 22 Entitlement / Allocation	FY 23 Entitlement / Allocation	FY 24 Entitlement / Allocation	
Title I, Part A	DESE	110,666	108,513	106,068	
Title II, Part A: Supporting Effective Instruction	DESE	46,298	44,808	43,482	
Title III: English Language Acquisition and Academic Achievement Program for English Learners and Immigrant Children and Youth	DESE	19,350	20,561	21,279	Grants are to be used to "supplement not supplant"
Title IV, Part A: Student Support and Academic Enrichment	DESE	10,000	10,000	10,000	The Department of Education provides specific guidelines and categories that grants may be used for that are above and beyond what is required for the Operating Budget.
Early Childhood Special Education (ECSE) Program Federal Entitlement Grant	DESE	19,839	20,945	21,121	
Individuals with Disabilities Education Act (IDEA) Federal Special Education Entitlement Grant	DESE	708,546	764,323	762,490	
METCO	DESE	508,693	510,800	510,800	
METCO PAC	DESE	20,158	43,578	22,770	
Innovations Pathway Grant	DESE			75,000	
Total Continuing Grants		\$ 1,444,550 \$	\$ 1,523,528 \$	\$ 1,573,010	
One-Time COVID Related Grants					
American Rescue Plan: Individuals with Disabilities Education Act		144,806			
American Rescue Plan: Individuals with Disabilities Education Act - Early Childhood		13,494			
American Rescue Plan-Homeless Children and Youth II		2,942			
Elementary and Secondary Schools Emergency Relief Fund (ESSER III)		796,636			
Total One-Time Grant Funds		\$ 957,878 \$	\$ - \$	\$ -	
Total Grants		\$ 2,402,428 \$	\$ 1,523,528 \$	\$ 1,573,010	



Capital Improvement Requests

School	Priority	Item	FY25 Request
Veterans	1	Structural Repair of D Wing	\$ 100,000
Glover	1	Replace LG HVAC Units	\$ 218,000
Village	1	Fire Panel Update	\$ 30,000
MHS	1	Paging System (also controls bells and clocks)	\$ 52,700
Vets	2	Repair vinyl flooring / trip hazards (Cracking at flooring expansion area between school wings)	\$ 43,900
Village	2	Remove delaminated concrete at entrance canopy (falling hazard)	\$ 55,000
Village	2	Replacement of Lunch Tables (20)	\$ 36,000
MHS	2	Turf Field Replacement & Improvements	\$ 200,000
MHS	3	Replacement of Bathroom Partitions	\$ 35,000
Vets	3	Refinishing Gymnasium Floors	\$ 55,000
Vets & Village	4	Noise Absorbing Baffles/Panels	\$ 25,619
Glover	4	Playground poured in place surface and additional play structures	\$ 400,000
Village	5	Small Field House Refurbishment	\$ 10,000
Village	5	Playground Refurbishment	\$ 250,000
Vehicles:		Small School Bus (1)	\$ 114,993
		Student Transportation 7-D Vehicles (1)	\$ 78,365
		Pick Up Truck with Plow (1)	\$ 79,965
		TOTAL	\$ 1,784,542



Athletics - User Fee Analysis & Structure

Currently, 50% of coach stipends are paid by user fees.

1. With level service funding

- a. Would keep 50% of coach stipend pay from user fees

2. With reduced service funding

- a. 100% of coaching stipends would be funded by user fees (student participants)
- b. Other athletic costs would remain in operating budget

High School		Middle School	
Category	23-24 Rate	Category	23-24 Rate
Athletic Teams/Performing Arts - Unlimited	\$495.00	Interscholastic Sports	\$220.00
High School Clubs	\$140.00	Intramural Sports/Activities	\$140.00
Flag Football - Sr. Girls	\$66.00		



Athletics & Activities User Fees

Revised Option 1

Option 1: Athletics - Flat Fee		
Athletics	Per Student Fee	Participation
HS Athletics (unlimited)	\$ 990	15% Reduction
MS Athletics Fee (unlimited)	\$ 440	15% Reduction
Non-Athletics		
HS Clubs or Flag Football (Unlimited)	\$ 290	
MS Intramural Sports/ Activities (unlimited)	\$ 290	
Elementary Intramural Sports/ Activities (unlimited)	\$ 290	
Family (2 Students)	\$ 1,800	

In Revised Option 1, we have assumed a 15% drop in participation rather than the 35% previously used in the model presented at the SC Budget Workshop on February 28, 2024.



Athletics & Activities User Fees

Revised Option 2

Greater than 50% of students play only one season.

Option 2: Athletics - Season Based Fee		
Athletics	Per Student Fee	Participation
HS - 1st season	\$ 540	0% Reduction
HS - 2nd season	\$ 490	10% Reduction
HS - 3rd season	\$ 440	15% Reduction
MS - 1st season	\$ 260	0% Reduction
MS - 2nd season	\$ 210	10% Reduction
MS - 3rd season	\$ 160	15% Reduction
Non-Athletics	Per Student Fee	
HS Clubs or Flag Football (Unlimited)	\$ 290	
MS Intramural Sports/ Activities (unlimited)	\$ 290	
Elementary Intramural Sports/ Activities (unlimited)	\$ 290	
Family Cap	\$ 2,060	

In Revised Option 2, we have assumed a 0% reduction in season 1 * 10% in season 2 * 15% in season 3. In the original proposal, the assumptions were 5% for season 1; 15% for season 2; & 25% for season 3.



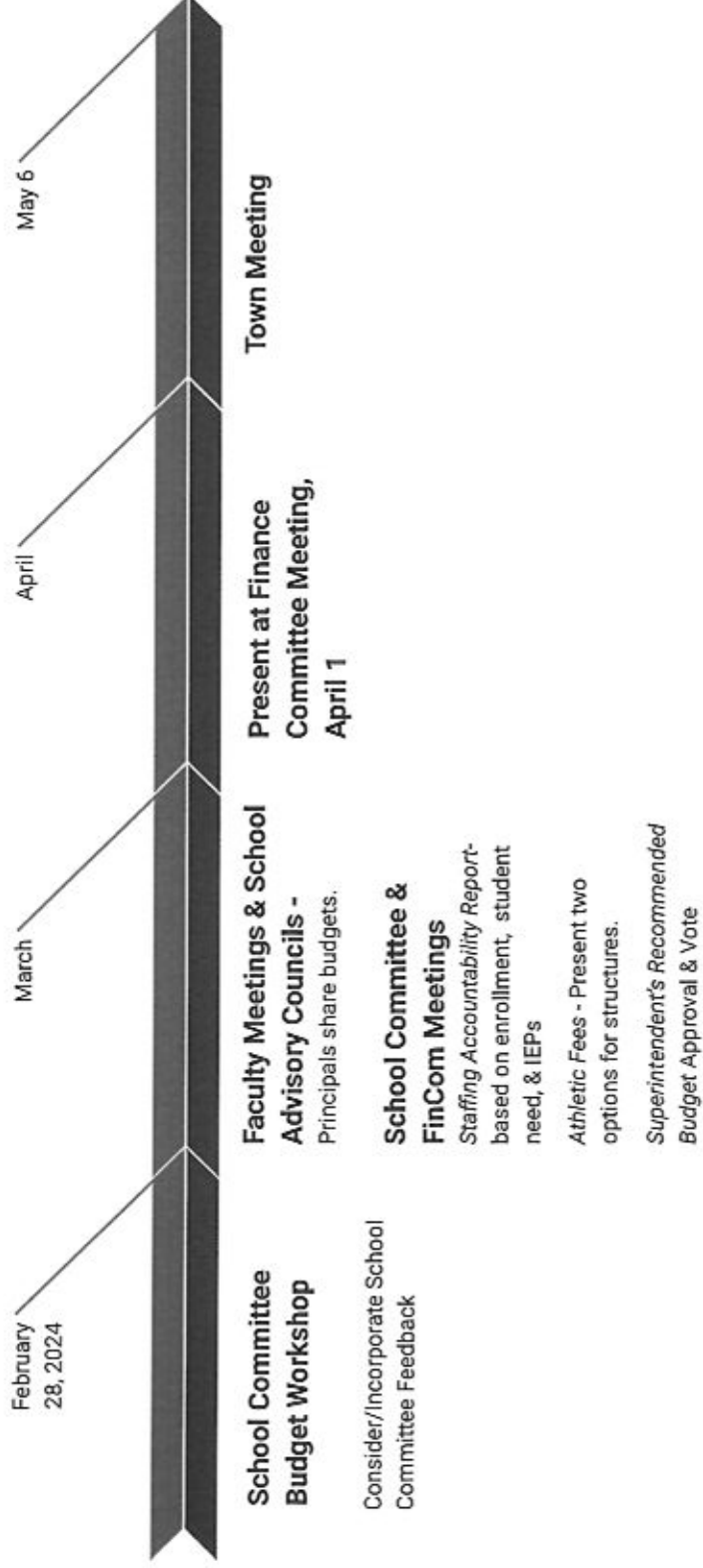
FY25 Budget Level Comparison

LEVEL SERVICES BUDGET	FY25 LEVEL SERVICES
FY25 Level Services Budget Request	\$47,423,851
FY24 Adopted Budget	\$44,837,273
Change \$	\$2,586,578
FY25 Level Services Budget Increase %	5.77%

REDUCED SERVICES BUDGET	FY25 REDUCED SERVICES
FY25 Reduced Services Budget Request	\$45,592,667
FY24 Adopted Budget	\$44,837,273
Change \$	\$755,394
FY25 Reduced Services Budget Increase %	1.68%



Next Steps



Marblehead Public Schools

MISSION * VISION * CORE VALUES

Mission

To foster in all students a passion for learning and to provide safe and nurturing, inclusive school environments in which they can develop the values, knowledge, and skills needed to achieve full potential in their personal, social and work lives to become engaged and contributing members of society.

Vision

To be a model school district, exemplary in its student engagement and academic excellence, in which all students and staff reach their highest potential *in partnership with the community.*

Core Values

Student Achievement: We will provide challenging standards and differentiated instruction to encourage students to excel and become confident, engaged learners who achieve their potential.

Personal Growth: We will provide students with opportunities to grow socially, emotionally, physically and academically, and to be respectful, contributing members of society.

Partnerships and Collaboration: As a shared responsibility, we will foster partnerships among the schools, families, businesses and community at large.

School Culture: We will create an environment of respect and appreciation for individual and cultural differences and instill a passion for responsible social action.

Resources: We will make decisions in the best interests of students' growth, recognizing funding that supports educational excellence and social/emotional well-being.



...A School district, exemplary in its student engagement and academic excellence, in which THESE students reach their highest potential in partnership with our community.

Addendum

Staffing Accountability Report

March, 2024

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Introduction & Background

This Addendum was created at the request of the School Committee as part of the preparation for the MPS FY25 Superintendent's Preliminary Budget in March, 2024. One of our articulated goals presented at the February 28, 2024 School Committee Budget Workshop in the Superintendent's FY25 Preliminary Budget [presentation](#) stated:

- *Sustaining the appropriate staffing levels and programs to support students' social, emotional, and behavioral health as our students continue to grapple with the effects of the pandemic.*

The **Staffing Accountability Report** is an addendum to the MPS FY25 Preliminary Budget that provides a more in-depth review of staffing by school—a snapshot, at this point in time—and using projections based on budget reductions and FY25 student enrollment data. The charts below include pertinent excerpts from the Budget Presentation and additional detailed information.

Overall Staffing & Enrollment



Elementary Enrollment, PreK - 6

FY24 Actual							
	PK	1	2	3	4	5	6
FY24 Actual							Total
Brown	33	105	99	101	106	x	x
Glover	33	60	87	79	77	x	x
Village	x	x	x	x	x	167	171
							537

Classrooms							
	PK	1	2	3	4	5	6
FY24 FTE							Total
Brown	3	5	5	5	x	x	23
Glover	3	4	4	4	x	x	19
Village	x	x	x	x	9	0	10
							27

Class Size							
	PK	1	2	3	4	5	6
FY24							Total
Brown	11	21	19	20	21	2	x
Glover	11	15	21	17	19	3	x
Village	x	x	x	x	21	21	18

Example:
 FY25 @Brown School = 454 students in 23 classrooms; SC Policy Average Class Size ~25 students

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This elementary enrollment and staffing chart displays:

- (1) Student enrollment.
- (2) The number of classrooms and general education teachers by grade level, and
- (3) The average class size by grade level.

The 'actual' enrollment as of February 2024 is on the left charts, and the FY25 'projected' information is on the right charts. The School Committee policy guidelines are for an average class size of approximately 25. All elementary average class sizes are below 25 students.

Lucretia and Joseph Brown Elementary School

Brown School													
Grades/Strands	PreK		Kindergarten		1st		2nd		3rd		TOTAL 24-25		
	23-24 SY	24-25 SY	23-24 SY	24-25 SY	23-24 SY	24-25 SY	24-23 SY	24-25 SY	23-24 SY	24-25 SY	Total # of Students	Teachers	Tutors
SY	NA	NA	NA	NA	NA	NA	2	2	6	3	5	1	3
Language Based	NA	NA	NA	NA	NA	NA	NA	NA	2	3	5	1	3
ABA/Intensive	NA	NA	NA	NA	NA	NA	NA	NA	NA	1	1	1	0
Therapeutic	NA	NA	NA	NA	2	1	3	2	1	3	6	1	3

Inclusion Teachers = 5 23-24SY

Average Student Caseload = *11

Speech & Language = 1.6

Sub-Separate Teachers = 4

Spec Ed Reading Tutors = 2

*Services provided for additional Tier II students as well



Brown Staffing, Reduced Services

Position	FY25 FTE Reduced Services
Principal/Asst Principal	1.00
Secretary	1.50
Classroom Teacher	20.00
Preschool Teacher	3.00
EL Teacher	3.60
Library Media Specialist	1.00
Specialist Teachers (Music, Art, PE, Health)	4.00
Paraprofessional/Tutor	9.76
School Counselor	2.50
Psychologist	1.00
Service Providers (OT/PT/Speech Lang)	3.00
Student Services Administrator	1.00
Special Ed Secretary	0.50
Special Ed Teacher	9.00
Special Education Paraprofessional/Tutor	11.00
Nurse	1.00
Café Worker	2.99
Total FTE	73.79



Position	FY24/FY25 Level Services FTE
Principal/Asst Principal	1.00
Secretary	2.00
Classroom Teacher	20.00
Preschool Teacher	3.00
EL Teacher	2.60
Library Media Specialist	1.00
Specialist Teachers (Music, Art, PE, Health)	4.00
Paraprofessional/Tutor	11.83
School Counselor	2.50
Psychologist	1.00
Service Providers (OT/PT/Speech Lang)	3.00
Student Services Administrator	1.00
Special Ed Secretary	0.50
Special Ed Teacher	9.00
Special Education Paraprofessional/Tutor	10.00
Nurse	1.00
Café Worker	2.99
Total FTE	76.36

Brown Class Size Overview, FY24 & 25

Grade/Level	FY24 Actual Class Size	FY25 Projected Class Size
PreK	11	11.07
K	21.2	22
1	19.0	21.6
2	20.2	20
3	21.2	20.2

Glover Elementary School

Glover School													
Grades/ Strands	PreK		Kindergarten		1st		2nd		3rd		TOTAL 24-25		
	23-24 SY	24-25 SY	23-24 SY	24-25 SY	23-24 SY	24-25 SY	24-23 SY	24-25 SY	23-24 SY	24-25 SY	Total # of Students	Teachers	Tutors
SY	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	3	1	NA
Language Based	NA	NA	NA	NA	NA	NA	NA	2	NA	1	3	1	NA
ABA/ Intensive	3	2-3	NA	NA	1	NA	4	1	1	4	10-11	2	3
Therapeutic	NA	NA	1	NA	NA	1 (going to Brown)	NA	NA	3	NA	(Program @Brown)		

Inclusion Teachers = 4 23-24SY

Average Student Caseload = *8.5

Sub-Separate Teachers = 8

Speech & Language = 1.6

Spec Ed Reading Tutors = 2

*Services provided for additional Tier II students as well

Glover Class Size Overview, FY24 & 25

Grade/SY	FY24 Actual Class Size	FY25 Projected Class Size
PreK	11	9.3
K	15	16.3
1	22	22
2	17	22.5
3	19	18.3



Glover Staffing, Reduced Services

Position	FY24/ FY25 Level Services FTE	FY25 FTE Reduced Services
Principal/Asst Principal	1.00	1.00
Secretary	1.00	1.00
Classroom Teacher	16.00	15.00
Preschool Teacher	3.00	3.00
EL Teacher	1.00	1.00
Library Media Specialist	1.00	1.00
Specialist Teachers (Music, Art, PE, Health)	3.00	3.00
Paraprofessional/Tutor	9.35	8.97
School Counselor	2.50	1.50
Psychologist	1.00	1.00
Service Providers (OT/PT/Speech Lang)	2.20	2.20
Special Ed Team Chair	1.00	1.00
Special Ed Secretary	0.50	0.50
Special Ed Teacher	7.00	6.00
Special Education Paraprofessional/Tutor	12.00	11.00
Nurse	1.00	1.00
Café Worker	2.00	2.00
Total FTE	64.55	60.17

Village Elementary School

Village School									
Grades/Strands	4th		5th		6th		TOTAL 24-25		
	23-24 SY	24-25 SY	23-24 SY	24-25 SY	23-24 SY	24-25 SY	Total # of Students	Teachers	Tutors
SY	8	5	11	9	15	11	25	5	6
Language Based/ Learning Disabilities	3	1	NA	3	3	NA	4	1	2
ABA/ Intensive	2	4	4	2	4	4	10	2	3

Inclusion Teachers = 7 23-24SY

Average Student Caseload = 10

Speech & Language = 2

Sub-Separate Teachers = 8

Spec Ed Reading Tutors = 3



Village Class Size Overview, FY24 & 25

Grade/SY	FY24 Actual Class Size	FY25 Projected Class Size
4	21	21
5	21	20
6	18	21



Village Staffing, Reduced Services

Position	FY24/ FY25 Level Services FTE
Principal/Asst Principal	2.00
Secretary	2.00
Classroom Teacher	26.00
EL Teacher	2.00
Library Media Specialist	1.00
Other Teachers	3.00
Specialist Teachers (Music, Art, PE, Health)	7.60
Paraprofessional/Tutor	3.75
Guidance Counselor	3.00
Psychologist	2.00
Service Providers (OT/PT/Speech Lang/BCBA)	2.00
Special Ed Team Chair	1.00
Special Ed Secretary	0.60
Special Ed Teacher	17.00
Special Education Paraprofessional/Tutor	13.00
Nurse	2.00
Café Worker	3.75
Total FTE	93.68



Position	FY25 FTE Reduced Services
Principal/Asst Principal	2.00
Secretary	2.00
Classroom Teacher	26.00
EL Teacher	2.00
Library Media Specialist	1.00
Other Teachers	3.00
Specialist Teachers (Music, Art, PE, Health)	7.60
Paraprofessional/Tutor	1.10
Guidance Counselor	3.00
Psychologist	2.00
Service Providers (OT/PT/Speech Lang/BCBA)	2.00
Special Ed Team Chair	1.00
Special Ed Secretary	0.60
Special Ed Teacher	16.00
Special Education Paraprofessional/Tutor	13.00
Nurse	2.00
Café Worker	3.75
Total FTE	87.05

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Marblehead Veterans Middle School

Veterans Middle School				
Grds/Strands	7th		8th	
	23-24 SY	24-25 SY	24-23 SY	24-25 SY
SY				TOTAL 24-25
Language Based & Learning Disabilities	10	15	5	10
ABA/Intensive	4	3	4	7
Therapeutic	3	4	1	3
				Total # of Students
				25
				Teachers
				3
				Tutors
				2
				4
				2

Inclusion Teachers = 4

Average Student Caseload = 18

Speech & Language = 0.6

Sub-Separate Teachers = 6

Spec Ed Reading Tutors = 2

23-24SY

 **MVMS Staffing, Reduced Services**

Subject	Average
English	19
Math	20
Science	22
Social Studies	20
World Language	23
Health/PE	20
Unified Arts	22
Performing Arts	20
School Totals	20.7

Position	FY24/ FY25 Level Services FTE	FY25 FTE Reduced Services
Principal/Asst Principal	2.00	1.00
Secretary	1.50	1.50
Classroom Teacher	23.10	22.10
EL Teacher	1.00	1.00
Library/Media Specialist	0.00	0.00
Specialist Teachers (Music, Art, PE, Health)	7.50	7.50
Paraprofessional/Tutor	1.00	1.00
Guidance Secretary	0.00	0.00
Guidance Counselor	2.00	2.00
Psychologist	2.00	2.00
Service Providers (OT/PT/Speech Lang/BCBA)	1.00	1.00
Special Ed Team Chair	1.00	1.00
Special Ed Secretary	0.40	0.40
Special Ed Teacher	10.00	10.00
Special Education Paraprofessional/Tutor	10.00	10.00
Nurse	1.00	1.00
Permanent Substitute	2.00	2.00
Café Worker	2.50	2.50
Total FTE	68.00	66.00

Marblehead High School

Marblehead High School												
Grades	9th		10th		11th		12th		TOTAL 24-25			
	23-24 SY	24-25 SY	23-24 SY	24-25 SY	24-23 SY	24-25 SY	23-24 SY	24-25 SY	Total # of Students	Teachers	Tutors	
SY	8	5	6	8	8	8	6	9	8	27	4	3
Language Based/LD	NA	4	2	NA	0	2	0	0	0	7	1	3
ABA/Intensive	5	2	4	5	6	4	8	8	6	17	3	3

Inclusion Teachers = 7 23-24SY

Average Student Caseload = 12

Speech & Language = 1

Sub-Separate Teachers = 8

Subject	Average
English	17
Math	18
Science	18
Social Studies	18
World Language	16
Wellness	20
Applied, Visual & Performing Arts, Business, Marine Technology, Culinary	15
School Totals	17



MHS Staffing, Reduced Services

Position	FY24/ FY25 Level Services FTE
Principal/Asst Principal	3.00
Secretary	3.55
Classroom Teacher	52.80
EL Teacher	1.00
Library Media Specialist	1.00
Specialist Teachers (Music, Unified Arts, PE, Health)	14.50
Paraprofessional/Tutor	1.33
Guidance Secretary	1.00
School Counselor	10.00
Psychologist	2.00
Service Providers (OT/PT/Speech Lang/BCBA)	1.00
Special Ed Team Chair	1.00
Special Ed Secretary	1.00
Special Ed Teacher	16.00
Special Education Paraprofessional/Tutor	15.00
Nurse	1.80
Café Worker	4.46
Security Monitor	2.00
Total FTE	132.44



Position	FY25 FTE Reduced Services
Principal/Asst Principal	3
Secretary	(2.05)
Classroom Teacher	52.6
EL Teacher	1
Library Media Specialist	1
Specialist Teachers (Music, Unified Arts, PE, Health)	14.5
Paraprofessional/Tutor	0
Guidance Secretary	1
School Counselor	(9)
Psychologist	2
Service Providers (OT/PT/Speech Lang/BCBA)	1
Special Ed Team Chair	1
Special Ed Secretary	1
Special Ed Teacher	(14.6)
Special Education Paraprofessional/Tutor	(12.4)
Nurse	1.8
Café Worker	4.46
Security Monitor	2
Total FTE	(134.4)

Special Education Staffing & Enrollment

Context: Broad Strokes View

All schools require appropriate staffing to meet the academic, social-emotional, and behavioral needs of students in a fiscally responsible way. Assessing students' needs is best accomplished by using standardized and proven diagnostic tools. Specific remedial services and interventions are then designed to mitigate disabilities that prevent a student from accessing the grade-level curriculum.

In MPS, data on student services is maintained in the Aspen student information system as well as on our hard copy IEPs. Raw data has a degree of error. At times, Aspen reporting functions yield inaccurate data so we rely on hand-scheduling some students based on their IEP needs and goals. Because school-building schedules do not all run on a 5-day cycle, the services may be recorded differently in Aspen, which leads to this inaccuracy. Any new unsigned IEPs are not considered active and were not included in this report. **To be clear, a spreadsheet with numerical data is not the best way to accurately and fully tell the story of students' needs and precisely how staffing roles and responsibilities meet those needs at each school. However, we've tried below.**

Service delivery models include: delivering support and instruction in general education classes, in co-taught general education classes, or in groups of 4-8 students during an instructional block, small group instruction, or 1:1 services. This in addition to, consultation between and among staff to support the sharing of best practices and needed carryover for individual students.

Intervention models are determined by the student's IEP Team consisting of highly trained general and special educators, trained tutors, and related service providers. Students' individualized programs are designed to help children access and make effective progress on the state's curriculum standards, and social-emotional development.

The table on the right, reflects the current hours of services being delivered in Consultation, (A) General Education setting (B), and Special Education settings (C). *Reading* is described more below.



Staffing Accountability Report

Current Service Grids 10/1/23 to Present

Type of Service	A Grid Consultation Time	B Grid in General Education	C Grid in Special Education Setting	Total Hours of Service Required/week
*Reading	0	NA	*340.92	340.92
Counseling	10.1	5.3	68.65	84.05
Speech/Language	5.36	22.98	151.45	179.79
Occupational Therapy	3.75	44.4	85.35	133.5
Physical Therapy	1.25	24.26	59.95	85.46
BCBA/Behavior Specialist	33.25	0	0	33.25

Process for Calculating Special Education Staff Service Delivery Time

To determine the appropriate staffing to meet the service delivery prescribed by IEPs, the following information was contributed by our principals and special education team chairs, and represents **one point in time (now)** as spring IEP meetings often require modifications, which results in changes in these grid totals. There is necessary variation in the scheduling, hours, needs, and positions at all three levels (elementary, middle, high). The closest estimate based on Principal + Team Chair information uses these formulas to determine staff hours available to deliver services:

Elementary teachers	4.75 / 6.25 hours per day
Middle school teachers	5 / 6.5 hours per day
High school teachers	5 / 6.5 hours per day
Tutors + Paras	5.5 / 6.5 hours per day

Summary of Specialists' & Student Support Needs (in Hours)



Staffing Accountability Report

Summary of Specialists' and Needs in Hours

Service on IEP Grids Compared to Staffing, PreK - 12			
Services	Hours on IEP's/Week	Hours of Staff Time/Week	Number of FTEs
*Reading	340.92	X (Requires explanation)	X
Counseling/Mental Health	64.05	629.5	26
Speech/Language	179.79	194.75	8.2
Occupational Therapy	133.5	142.5	6
Physical Therapy	85.46	71.25	3
BCBA (A Grid only - Consults)	33.25	47.5	2

Staffing in the different service categories (reading, mental health, PT/OT, SLP, BCBA) includes multiple settings and programmatic differences of delivery, so it is difficult to illustrate in a slide, without conversation.

- > Counseling services include general education interventions, Tier I and Tier II.
- > Related Services, OT, PT and SLP services, include early intervention & modeling in classrooms.
- > BCBA hours are all recorded in the A Grid and include consultation, as dictated by the roles their job description entails.

For Example:

- o Reading services are delivered in Language Based classrooms, in inclusion classrooms, and in Co-Taught settings, as well as in 1:1 direct reading tutoring settings with prescriptive reading interventions.

Licensed Specialists Job Descriptions

These positions are *not* licensed by the Department of Elementary and Secondary Education (DESE), rather, the State Licensing Board.

BCBA, Board Certified Behavior Analyst

- Create an ongoing data collection system to establish baseline behaviors, antecedents, and consequences for identified students.
- Develop behavior plans/treatment or discrete trial plans for these students with a focus on teaching and other antecedent strategies for reducing problematic behavior(s).
- Monitor use of strategies and data collection for fidelity and efficacy.
- Consultation with all team members including teachers, support staff and other related service providers.

Physical Therapist

- Screening, evaluation and treatment of students PK - 12 for need of service for gross motor, balance, lower body coordination/strength and functional mobility for access to the curriculum.
- Consultation with all team members including teachers, support staff, other related service providers and families
- Develop and implement student treatment plans addressing needs identified on evaluations.
- Monitor use and carry-over of strategies and accommodations within the general education setting

Occupational Therapist

- Evaluation and treatment of students PK - 12 for need of service for fine motor, visual motor, upper body coordination/strength, sensory motor, activities of daily living and handwriting supports for access to the curriculum.
- Screening PK -12 across the district before full evaluation as per TAT/team/parent requests.
- Consultation with all team members including teachers, support staff, other related service providers and families
- Develop and implement student treatment plans addressing needs identified on evaluations.
- Monitor use and carry-over of strategies and accommodations within the general education setting

Speech / Language Therapist

- Screening, evaluation and treatment of students PK - 12 for need of service for articulation, functional communication, augmentative and alternative communication (AAC), social pragmatic communication, language based disorders, fluency of speech, phonological processes disorders, hearing impairment and auditory processing disorders for access to the curriculum.

- Consultation with all team members including teachers, support staff, other related service providers and families
- Develop and implement student treatment plans addressing needs identified on evaluations
- Monitor use and carry-over of strategies and accommodations within the general education setting

Special Education Program Descriptions

Language-Based/Learning Disability

- Students with language-based learning disabilities, communication impairments, or neurological disabilities receive specially designed instruction in their least restrictive environment. Small group or individualized instruction can be provided by special education teachers and support staff who are trained in specialized reading programs, math interventions, and written language supports. Instruction is provided along the continuum from sub-separate classes for core content that meets the MA Curriculum Frameworks standards to sub-separate classes with modified standards. These services provide students with an instructional program that supports the development of academic, executive functioning, communication, and self-advocacy skills.

Therapeutic Support

- Students with emotional disabilities or other impairments that significantly impact their self-regulation skills receive a continuum of services and supports that include teaching emotional regulation strategies, social skills, and executive functioning skills. Therapeutic instructional practices are provided in small group settings, within general education classrooms, and/or embedded in core content instruction.

Applied Behavior Analysis-Based Support (ABA)

- Students with autism spectrum disorders, developmental disabilities, or intellectual/cognitive disabilities receive specialized instruction and services designed to meet their individualized needs. Instruction often takes place in small group or individual settings across the course of the day utilizing the principles of Applied Behavioral Analysis (ABA), which is a highly-structured system of teaching skills and positive behavioral support. Classroom curriculum is based on state standards but may be significantly modified or adapted to students' individual entry points. Instruction also focuses on activities of daily living (ADLs), functional skills, and pre-vocational skills.

English Learners

Students who are *English Learners*, or *ELs*, are learning and progressing their academic English skills in listening, speaking, reading, and writing. ELs may come from non-English speaking homes or homes where English is spoken in addition to the families' native language(s). ELs may be born in the United States or they may be born in another country. In order to successfully access the grade-level curriculum, students who are ELs require explicit English instruction in addition to their classroom work, which is provided by an English Language Education (ELE) teacher. Our ELE classes are vertically and horizontally aligned across grade levels and schools in order to create a cohesive ELE curriculum for all of our students.



English Learners (EL), Enrollment

Enrollment by grade, 2024-2025 SY

Grade Span	# of students	Projected FY25 Staffing (FTEs)
K-3	31	2.5
4-6	43	2
7-8	17	1
9-12	17	1
Total	108	6.5

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Staffing Budget Drivers & Reduction Process

Budget Driver - FY24 Unit A Staffing

Unit A Staff FTE by Lane and Step												
STEP	LANE / COLUMN											
	B	BP	B21	B30	M	NH5	ND0	M45	M60	MT5		
1	0	0	0	0	0	0	0	0	0	0	0	0
2	3	0	0	0	6.8	1	0	0	0	0	0	0
3	3	0	0	0	22.1	0	0	0	0	0	0	0
4	3	0	0	0	23	0	0	0	0	0	0	3
5	0	0	0	0	8	0	0	0	0	0	0	0
6	1	0	0	0	4.7	0	0	0	0	0	0	1
7	2	0	0	0	7	0	0	2	0	0	0	0
8	0.5	0	0	0	3	4	2	1	0	0	0	0
9	6	0	0	0	34.1	1.6	1	0	0	0	0	1
10	0	0	0	0	3	3	3	0	0	0	0	0
11	0	0	0	0	42.6	33	33.6	23	23	23	23	34.3

We are fortunate to have a talented and experienced staff in Marblehead Public Schools.

Data on this chart indicate the predominant level by Lane and Step where our Unit A Staff Members are placed based on years of experience and college degrees. The large majority of our Unit A Staff have Masters degrees and are on the top Step, number 11.

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The Town is faced with an ongoing structural budget deficit, where recurring revenues are not keeping pace with recurring expenses for Town and School Departments. The primary measure to address a structural budget deficit is to include a Proposition 2 ½ override on the ballot. Without the passage of an override, the reductions to the Schools could be drastic over time. In order to prepare for that contingency, the district has adopted a *tiered decision-making methodology* to use for making reductions to the general fund in a thoughtful manner. This methodology is predicated on the district's practice of efficiency with budgeting, reallocating where necessary to ensure alignment between what is needed for a high-quality education for students and the deployment of resources.

FY25 Reduced Services Budget Methodology

Tiered Decision-Making

First Tier: **Administrative and Operational Efficiency**

1. Professional Development
2. Transportation

Second Tier: **Extracurricular Programs**

1. Extracurricular Programs

Third Tier: **Educational Programs and Classroom Resources**

1. Curriculum Purchases
2. Instructional Materials and Supplies
3. Technology
4. High School Courses

Fourth Tier: **Human Resources** (The School Department budget is 80% salaries/wages.)

1. Staffing Group A: Leadership / Administrative and Other Positions
2. Staffing Group B: Support Staff
3. Staffing Group C: Professional Staff Positions that are not Classroom Teachers
4. Staffing Group D: Instructional Staff

*MPS_new.FY25_Non-Override_Budget_Methodology (in full) 18



Office of Teaching & Learning

While staffing is consistent, budget reductions are reflected in the professional development, contracted services, and curriculum purchase lines in the operating budget.

Position	FY24/ FY25 Level Services FTE	FY25 FTE Reduced Services
Literacy Specialist	2.00	2.00
Math Specialist	1.00	1.00
Total FTE	3.00	3.00



Position	FY24/ FY25 Level Services FTE	FY25 FTE Reduced Services
Literacy Specialist	1.00	1.00
Math Specialist	1.00	1.00
Total FTE	2.00	2.00

** Current staff listed only include those funded through the operating budget designated as districtwide, and excludes Assistant Superintendent of Teaching and Learning who is reported under Central Administration. All other staff are reflected at their assigned school locations.

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Athletics - Staffing

Position	FY24/ FY25 Level Services FTE	FY25 FTE Reduced Services
ATHLETIC DIRECTOR	1.00	1.1
ASSTANT ATHLETIC DIRECTOR	1.00	1.1
Total FTE	2.00	2.1



Position	FY24/ FY25 Level Services FTE	FY25 FTE Reduced Services
ATHLETIC DIRECTOR	1.00	1.1
ASSTANT ATHLETIC DIRECTOR	1.00	1.1
Total FTE	2.00	2.1



Special Education

***Current staff listed on this Special Education slide includes only staff designated as *districtwide*, and excludes Director and Assistant Director of Student Services who are reported under Central Administration.

All other Special Education staff are reflected at their assigned school locations.

Position	FY24/ FY25 Level Services FTE	FY25 FTE Reduced Services
Administrative Assistant	0.50	1.00
Early Education Program Coordinator	1.00	1.00
Certified Occupational Therapy Assistant	4.00	4.00
Occupational therapist	2.00	2.00
Physical Therapist	2.00	2.00
Physical Therapy Assistant	1.00	1.00
BCBA/Behavior Specialist	3.00	2.00
Total FTE	13.50	13.00



Position	FY24/ FY25 Level Services FTE	FY25 FTE Reduced Services
Administrative Assistant	0.50	1.00
Early Education Program Coordinator	1.00	1.00
Certified Occupational Therapy Assistant	4.00	4.00
Occupational therapist	2.00	2.00
Physical Therapist	2.00	2.00
Physical Therapy Assistant	1.00	1.00
BCBA/Behavior Specialist	3.00	2.00
Total FTE	13.50	13.00

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Technology & Facilities

Technology

Position	FY24/ FY25 Level Services FTE
Network Specialist	1.00
Computer Support Specialist	3.50
Data Specialist	0.80
Total FTE	5.30

District-Owned Devices

Device	Count
Apple iPads	1453
Chromebooks	2612
Laptops	520
Desktops	485
Total	5110

Device Use Overview

Grades K-2: Apple iPads 1:1
 Grades 3-6: Chromebooks 1:1
 Grades 7-8: Chromebooks 1:2
 Grades 9-12: Chromebooks classroom banners & MCAS devices; MHS BYOD

*Devices connected onto our system over the last 30 days = 12,706

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Facilities

Position	FY24/ FY25 Level Services FTE
Head Custodian	5.00
Assistant Head Custodian	3.00
Custodian	17.00
Maintenance Supervisor	1.00
Maintenance Worker	4.00
Bus Driver	0.50
Bus Monitor	0.70
Total FTE	36.20

Device	Square Footage	Requirements Starting Based on CS DE*
Classroom	30,000	2
Library	35,000	2
Workshop	20,000	4
Lab	10,000	4
Other	25,000	12
Total		24

*Use of this table is based on the most recent information available. Your Facilities Services Staff Positions. *Under the National Center for Education Statistics (NCES) the Composite Building Data for all schools nationwide are available.

Commons Educated Data Standards (CEDDS)

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Contributors

Interim Superintendent, Interim Director of Student Services, Assistant Superintendent of Teaching & Learning, Principals, Special Education Team Chairs



Marblehead Public Schools

9 Widger Road
Marblehead, Massachusetts 01945
Phone: (781) 639-3140

Dr. Theresa B. McGuinness
Interim Superintendent of Schools

Ms. Julia Ferreira
*Assistant Superintendent of
Teaching & Learning*

Ms. Michelle Cresta
*Assistant Superintendent of
Finance & Operations*

MEMORANDUM

TO: Marblehead School Committee
FROM: Mary DeLai, Interim Director for Finance & Operations
CC: Dr. Theresa B. McGuinness, Superintendent
DATE: March 19, 2024
RE: REVISED User Fee Proposal for the 2024-2025 School Year

Based on comments and questions received at the March 7th Marblehead School Committee, we have reevaluated the assumptions used to calculate the proposed new user fee schedule for SY'2024-25. Below you will find a revised Option 1 and Option 2 fee proposal. With Option 3 appearing to be the least favorable, we have eliminated it from consideration.

As a reminder, our CURRENT user fees structure for the 2023-2024 school year is a flat fee structure. The rates are as follows:

CURRENT YEAR: Athletics - Flat Fee	
Athletics	Per Student Fee
HS Athletics (unlimited)	\$ 495
MS Athletics Fee (unlimited)	\$ 220
Non-Athletics	
Per Student Fee	
HS Clubs (Unlimited)	\$ 140
Flag Football	\$ 66
MS Intramural Sports/ Activities (unlimited)	\$ 140
Elementary Activities (unlimited)	\$ 140
Family Cap	\$ 800

The current structure also provides for a full fee waiver for students that qualify for free or reduced school lunches.

The revised Option 1 athletics fee assumes there will be a 15% drop in participation due to the increased user fee. In our initial analysis, we had assumed a 35% decrease. The revised athletic fees shown below appear to be more in line with what Committee members were anticipating.

Revised Option 1 maintains the same structure and increases the fees and family cap.

Option 1: Athletics - Flat Fee		
Athletics	Per Student Fee	Participation
HS Athletics (unlimited)	\$ 990	15% Reduction
MS Athletics Fee (unlimited)	\$ 440	15% Reduction
Non-Athletics	Per Student Fee	
HS Clubs or Flag Football (Unlimited)	\$ 290	
MS Intramural Sports/ Activities (unlimited)	\$ 290	
Elementary Intramural Sports/ Activities (unlimited)	\$ 290	
Family (2 Students)	\$ 1,800	

The revised Option 2 athletic fee structure proposal would implement a per season sport, with the per season amount decreasing for each subsequent sport. Given that half of our student athletes participate in one season only, this proposal would be least impactful to the greatest number of students. In the revised proposal, we have adjusted our assumptions regarding participation. Initially we had assumed a 5% decrease for the first season, 15% for the second season, and 25% for the third season. The revised fees assume a 0% participation decline in the first season, 10% for the second season, and 15% for the third season.

Revised Option 2 changes the structure to be flat fee for activities and a separate per season cost for athletic fees. In addition, the family cap is raised to \$2,060.

Option 2: Athletics - Season Based Fee		
Athletics	Per Student Fee	Participation
HS - 1st season	\$ 540	0% Reduction
HS - 2nd season	\$ 490	10% Reduction
HS - 3rd season	\$ 440	15% Reduction
MS - 1st season	\$ 260	0% Reduction
MS - 2nd season	\$ 210	10% Reduction
MS - 3rd season	\$ 160	15% Reduction
Non-Athletics	Per Student Fee	
HS Clubs or Flag Football (Unlimited)	\$ 290	
MS Intramural Sports/ Activities (unlimited)	\$ 290	
Elementary Intramural Sports/ Activities (unlimited)	\$ 290	
Family Cap	\$ 2,060	

Both proposed options include a change in the fee waiver for free and reduced qualifying students to 75% of the fee with the student paying 25% of any fee. In addition, all options include a limited additional financial aid opportunity for students that do not qualify for free or reduced lunch but find themselves in need of assistance. This additional option provides a waiver of 50% of the user fee.

It is our recommendation that the Committee adopt Revised Option 2 as it is more equitable for students and families. Given that approximately 50% of our student athletes play only one season, they will not feel as significant an impact unless there are multiple student athletes within the same family.

Suggested Motion:

Motion that the School Committee approve the user fee rates for the 2024-2025 school year following Revised Option 2 (Season Based Fee).



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*Assistant Superintendent of
Finance & Operations*

Memorandum

To: Marblehead School Committee
From: Theresa B. McGuinness, Ed.D, Interim Superintendent
RE: Staffing Accountability Report - *Addendum* to the FY 25 Preliminary Budget
Date: March 21, 2024

Introduction & Background

This Addendum was created at the request of the School Committee as part of the preparation for the MPS FY25 Superintendent's Preliminary Budget in March, 2024. One of our articulated goals presented at the February 28, 2024 School Committee Budget Workshop in the Superintendent's FY25 Preliminary Budget [presentation](#) stated:

- *Sustaining the appropriate staffing levels and programs to support students' social, emotional, and behavioral health as our students continue to grapple with the effects of the pandemic.*

The **Staffing Accountability Report** ([Link](#)) is an addendum to the MPS FY25 Preliminary Budget that provides a more in-depth review of staffing by school—a *snapshot*, at this point in time—and using projections based on budget reductions and FY25 student enrollment data.



Marblehead Public Schools

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Marblehead, Massachusetts 01945
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Dr. Theresa B. McGuinness
Interim Superintendent of Schools

Ms. Julia Ferreira
*Assistant Superintendent of
Teaching & Learning*

Ms. Michelle Cresta
*Assistant Superintendent of
Finance & Operations*

MEMORANDUM

TO: Marblehead School Committee
FROM: Mary DeLai, Interim Director of Finance and Operations
DATE: March 20, 2024
RE: Schedule of Bills for Approval

Included in this packet are the following Schedules of Bills for your consideration. The schedules and invoices have been uploaded to the shared drive.

Schedule	Amount
24860	\$ 22.66
24861	\$ 10,619.15
24865	\$ 7,643.00
24866	\$ 17,141.27
24867	\$ 11,005.44
24879	\$ 132,465.20
24880	\$ 51,759.10
24881	\$ 569.14
24882	\$ 72,498.85
24890	\$ 21,801.33
24902	\$ 104,274.56
TOTAL	\$ 429,799.70

Suggested Motion:

Motion to approve the identified schedules of bills totaling \$429,799.70.

Record of the Marblehead School Committee Meeting
Thursday January 04, 2024
7:00PM

Members Present: Sarah Fox, Brian Ota, Jennifer Schaeffner , Alison Taylor. Meaghan Taylor

Also Present: Dr. Theresa McGuinness-Interim Superintendent, Michelle Cresta-Assistant Superintendent of Finance and Operations, Julia Ferreira-Assistant Superintendent of Teaching and Learning

I. Initial Business

a. Call to Order

Ms. Fox called the meeting to order at 7:01PM

b. Commendations

- Sarah Fox wants to commend the leadership team for always being willing to adapt and take on additional roles to help their colleagues during this time of transition

c. Public Comment

- Mary McCariston-46 Pine Cliff Drive
 - Ms. McCariston asks the School Committee to step down
 - She wishes Michelle and Theresa good luck on their future endeavors

II. District Updates-Dr. Theresa McGuinness

- Dan Richards will be stepping in as Principal at Glover School for the remainder of Hope Doran's leave
- Matt Fox will be going back to the Veterans Middle School starting Monday 01/08/24
- Michelle Cresta has accepted a role as the Director of Finance and Operations for Manchester Essex Regional School District
 - Michelle will be with Marblehead Public Schools through 03/22/24
- Dr. McGuinness announces that the Administrative Offices will be temporarily moving from the Mary Alley Building to the Brown School due to a water break
- Dr. McGuinness provides an update on the Student Services Department
 - The District, Dr. Paula Donnelley and Emily Dean have mutually agreed to end their employment relationship
 - The District will begin a search for the Interim Director of Student Services immediately
- Marblehead Public Schools hired two new Behavior analysts
 - Catherine Woods is at the Brown School and Emily Boutin will be at the Glover School
- There are two events on 01/10/24 for Students, Parents and Community members
 - Chris Herren, a former NBA Celtics player will be talking to the Students about his struggles with addiction during an assembly
 - There will be an event for the parents and community members in the evening
- Dr. McGuinness informs the District that she will not be seeking the permanent Superintendent position for Marblehead Public Schools
- School Calendar 2024/2025 Draft
 - The Leadership Team has begun discussions surrounding the 2024/2025 School Calendar

- Dr. McGuinness proposes two calendars with different Winter Breaks and asks for the School Committees input
 - Sarah Fox opens it up for discussion
 - Alison Taylor would like to suggest having the full day off on 12/23/24 rather than having it be a half day
 - Mcaghan Taylor agrees due to attendance concerns for 12/23/24 if we do not
- FY25 Budget Status Update-Michelle Cresta
 - 01/02/24 there was a working budget meeting with Principals , Dr. McGuinness, Assistant Superintendent Julia Ferreira, Emma Puglisi and Michelle Cresta
 - They looked at additional staffing requests, they began to examine enrollment projections and staffing assignments, and they looked at additional funding sources
 - Next budget session will focus on those areas mentioned as well as working on the process of arriving at a level funded budget
 - The budget books were initially going to be available on 01/12/24 but this deadline will be pushed out due to changes still being made

III. Consent Action and Agenda Items

a. Schedule of Bills (vote)

Motion to approve the identified schedule of bills totaling \$996,685.92

Moved by Ms. Schaeffner, Seconded by Mr. Alison Taylor

Ms. Meaghan Taylor, Ms. Alison Taylor, Mr. Ota, Ms. Schaeffner, and Ms. Fox-All Yes

A vote was taken, and the motion passes 5-0

b. Approval of Minutes (vote)

- Sarah Fox would like to postpone the vote on the approval of minutes until the next meeting so that edits can be made

IV. School Committee Communication and Discussion Items

a. Approval of Pan Mass Marblehead Club Creation (vote)

- The School Committee received an email from a student, Xaviar Grazado, requesting the creation of the Pan Mass Marblehead Club
- Xaviar explains that the club would be called Pan Mass MHD
- It would be a charity bike ride that would raise funds for cancer research at the Dana Farber Institute

Ms. Fox asks for a motion to approve the creation of the Marblehead Pan Mass Club to create a Student Activity account

Moved by Ms. Schaeffner, Seconded by Mr. Alison Taylor

Opened up for Discussion

- None

Ms. Meaghan Taylor, Ms. Alison Taylor, Mr. Ota, Ms. Schaeffner, and Ms. Fox-All Yes

A vote was taken, and the motion passes 5-0

b. Superintendent-School Committee Communications

- Sarah Fox asks the School Committee to “make a commitment to stick to their operating protocols” and not rely on Dr. McGuinness as a go between

c. Interim Superintendent Goals Discussion (vote)

- A month and a half ago Dr. McGuinness outlined her goals
- Sarah Fox shares a memo with the Committee containing the updates made to Dr. McGuinness’s goals

Opened for Discussion

- Jen Schaeffner asks Dr. McGuinness about her first goal which focuses on administrator evaluations
- She asks how the School Committee will be able to see that the evaluations have been completed
- Dr. McGuinness explains how the Committee will be able to confirm this
- Jen Schaeffner states that the goal she would like to see added is the “staff accountability” study
- They will be adding staff accountability to Dr. McGuinness’s second goal

Ms. Fox asks for a motion to approve Dr. McGuinness’s goals as presented with one edit to goal 2

Moved by Ms. Schaeffner, Seconded by Ms. Alison Taylor

Opened up for Discussion

- None

Ms. Meaghan Taylor, Ms. Alison Taylor, Mr. Ota, Ms. Schaeffner, and Ms. Fox-All Yes

A vote was taken, and the motion passes 5-0

d. Superintendent Search Process Discussion

- A slide outlining the search process for the new Superintendent is shared by Sarah Fox
 - She differentiates between the private recruiting firm and the consulting associations
 - cost will be a deciding factor in which one Marblehead will go with when going through the search process
 - Sarah outlines the three associations that we have requested quotes from
 - NASDAQ, MASC and The Collins Center
 - Sarah explains what the process looks like from each of these different associations

Opened for Discussion

- Meaghan Taylor supports having a consultant lead this process and believes it is extremely important
- Jennifer Schaeffner states that the consultant does not recruit the candidates
 - Jennifer suggests that they use a combination of a consultant and Kelley to mitigate some of the cost
- Alison Taylor is concerned that without a recruiter they will get the same candidates they have gotten in the past search processes
- Brian Ota believes that having a third party be a part of the process would eliminate some of the errors that have been identified

Ms. Fox asks for a motion to proceed with Kelley acting as our facilitator

Moved by Ms. Schaeffner, Seconded by Mr. Brian Ota

Opened up for Discussion

- Brian Ota is concerned with the additional open positions that it will be a lot of work for Kelley to facilitate this search
- Meaghan Taylor states that we should listen to the guidance from Dr. McGuinness
 - She points out that "legitimacy is an important part of this process for the community"
- Alison Taylor asks Kelley what she believes the additional work would entail and if she believes she could handle it in conjunction with her normal job responsibilities
 - Kelley states that with the support of the business office she would be able to help facilitate this search

Motion to start moving through the process with Kelley as our facilitator while also asking Michelle at the same time to request bids

Ms. Alison Taylor, Mr. Ota, Ms. Schaeffner, and Ms. Fox-All Yes

Ms. Meaghan Taylor-No

A vote was taken, and the motion passes 4-1

- Student Services Search Committee
 - Meaghan Taylor and Brian Ota will be the School Committee representatives for the Student Services Search Committee
- Assistant Superintendent of Finance and Operations Search Committee
 - Michelle is asked for a list of everything that falls under her purview
 - This will be discussed further at the meeting on 01/18/24
 - The committee members for the Search Committee will be selected on 01/18/24
- Superintendent Search Committee
 - The School Committee members that will be on this search committee will be decided at the meeting on 01/18/24

e. Engagement of Legal Council (vote)

Motion to affirm retaining Valerio, Dominello and Hillman as our legal council

Moved by Ms. Schaeffner, Seconded by Mr. Alison Taylor

Opened up for Discussion

- Meaghan Taylor states that she does not believe they have done their due diligence prior to signing this firm

Ms. Alison Taylor, Mr. Ota, Ms. Schaeffner, and Ms. Fox-All Yes

Ms. Meaghan Taylor-No

A vote was taken, and the motion passes 4-1

f. Subcommittee and Liaison Updates and Discussion

- Sarah Fox-Facilities Subcommittee
 - Sustainable Marblehead reached out regarding the utilization of electric buses
 - They looked into a grant that is available through the end of February 2024 that will give districts \$200,000 to purchase an electric bus
- Jennifer Schaeffner-Policy Subcommittee
 - Students reached out to the School Committee via email wanting to have input in the Flag Policy
 - There was a meeting held today during “Magic Block” with Julia Ferreira, Dr. Carlson, Jennifer Schaeffner, and Sarah Fox
 - They heard from students regarding the flag policy that is being worked on
 - There will be another session on 01/12/24

V. Closing Business

a. New Business-School Committee Announcements and Requests

- Brian Ota asks where the Special Education Audit is at in the process and when the School Committee will have that RFP

b. Correspondence

- None

c. Adjournment

Meeting is adjourned at 9:00 PM by School Committee Chair Ms. Fox

Respectfully Submitted,
Allison McMahon, Secretary
Marblehead School Committee

MEMORANDUM

To: Marblehead School Committee

From: Janice Skalaban, DECA Advisor

Date: March 21, 2024

Subject: DECA International Career Development Conference

On April 27-30, more than 10,000 DECA members will demonstrate their college and career knowledge and skills by participating in DECA's Competitive Events Program. They are finalists from their chartered associations hoping to be named international champions. (DECA.org/conferences/ICDC.).

We request permission for an overnight field trip for three DECA students to attend the DECA International Career Development Conference in Anaheim, California. We would fly out of Logan Airport on Friday, April 26, and return on Wednesday, May 1.

Three students qualified to compete through their events at the State Career Development Conference in March. Parents will receive a permission packet they must complete and sign, including the following information and pricing.

- All Massachusetts DECA chapters will stay at the Embassy Suites Anaheim South, 11767 Harbor Blvd., Garden Grove, CA 92840.
- The three girls will be staying in the same room. One queen-size bed is for the two juniors, who are close friends and have shared a bed during previous DECA trips. The senior will sleep in the other queen-size bed. The three students are DECA officers and are well-known to each other.
- The price per student is \$650, plus attraction tickets and meals. (Originally \$2,285, reduced through fundraising)
- The hotel provides shuttle buses to and from the Anaheim Convention Center for competitive events, sessions, award ceremonies, workshops, and over 65 college, career, and business exhibits.

MEMO for the Marblehead School Committee

MHS Music Department to Ireland

April 2025

WHEN: April Vacation 2025.

Likely April 20-27, 2025 pending finalized school calendar. No school days missed. April 20 is Easter, but we'd be flying that evening.

WHERE: Ireland

HIGHLIGHTS:

- 3 Performances as a part of "American Celebration of Music in Ireland" Concert Series, including the famous St. Patrick's Cathedral in Dublin.
- Exchange concert/workshop with an Irish HS Music Program
- Various museums/historic sights to visit.

WHO: This trip is open to all members of the MHS Music Department.

- Students in Treble Choir, Mixed Choir, Concert Band, Orchestra.

ROOMING: Double Occupancy. 2 beds to a room. 2 students to a room.

COST: \$3798.00 per student

TOUR COMPANY: Music Celebrations International.

INSURANCE: 2 Insurance options attached - Deluxe and Cancel for Any Reason.

The Honorable
Cllr. Eddie Hoare
Mayor of Galway

The Honorable
Cllr. Daithí de Róiste
Lord Mayor of Dublin

together with

Music Celebrations International

cordially invites the

Marblehead High School

Music Department

to be a representative of

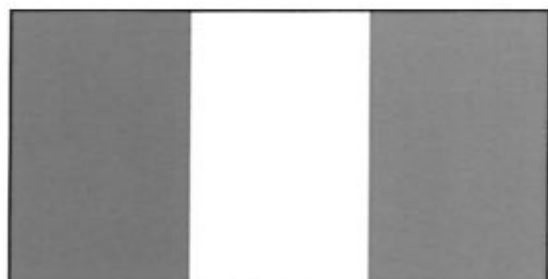
Massachusetts

in performance at the

2025

American Celebration of Music
Concert Series in

Ireland





Music Celebrations International, L.L.C.

1440 S. Priest Drive, Suite 102, Tempe, AZ 85281-6954

(480) 894.3330 (800) 395.2036 Fax (480) 894.5137

info@musiccelebrations.com

February 13, 2024

Andrew Scoglio, Choral Director
Marblehead High School
2 Humphrey St #1920
Marblehead, MA 01945

Dear Mr. Scoglio and Performing Arts Colleagues –

Music Celebrations International officially joins with the mayors of Galway and Dublin, along with the Ireland Tourist Board, to extend an official invitation to the **MARBLEHEAD HIGH SCHOOL MUSIC DEPARTMENT** to participate and perform as part of the **2025 AMERICAN CELEBRATION OF MUSIC IN IRELAND** prestigious international concert series. Ireland's official recognition of this concert series facilitates greater access to venues, official publicity, and very successful concert and musical arrangements.

By accepting this invitation, you are offering your Marblehead High School musicians and non-performing MHS guests an opportunity to:

- ★ Walk in the Footsteps of Sir John Andrew Stevenson, Michele Esposito, and Sir James Galway.
- ★ Experience the excitement of performing in some of Ireland's most impressive spaces.
- ★ Experience the thrill of performing to incredibly large, appreciative audiences.
- ★ Grow and strengthen the reputation of your MHS ensembles at home and abroad.
- ★ Experience unparalleled educational and cultural opportunities and memories that will last a lifetime.

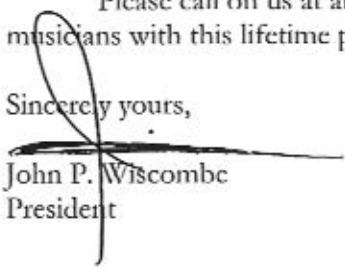
Because successful and meaningful performances are of the greatest importance to us, the Marblehead High School music ensembles will perform in Irish venues of the highest musical and historical quality. To ensure your success in and enjoyment of this celebration, we work with co-sponsoring cities in providing venue coordination, publicity and special acknowledgement of your group.

Music Celebrations International has been organizing concert tours of exceptional quality throughout the world for over 30 years. Our professional and experienced staff will manage all of your MHS travel, concert/performance, logistics, sightseeing, and accommodation arrangements – down to the last detail! Rest assured that the prices listed for each Tour cover the cost of everything that will enable your group to have an exceptional experience!

I am very excited about the musical stimulation this tour will undoubtedly provide. My dream, and the purpose of Music Celebrations, is to provide life-changing experiences that will raise the level of musicianship and dedication to the performing arts not only in our own country but throughout the world.

Please call on us at any time for any reason. We look forward to partnering with you in providing your musicians with this lifetime performance opportunity.

Sincerely yours,


John P. Wiscombe
President

AMERICAN CELEBRATION OF MUSIC IN IRELAND
MUSIC CELEBRATIONS INTERNATIONAL
 Cost Estimates
MARBLEHEAD HIGH SCHOOL MUSIC DEPARTMENT

The following are cost estimates for MCI's suggested tour options, with roundtrip airfare from the **Boston, MA** airport (**BOS**) during **Low Season***.

Including Round-trip airfare from <u>Boston, MA (BOS)</u>	<i>45-47</i> <i>Paying</i> <i>(+4 free)</i>	<i>40-44</i> <i>Paying</i> <i>(+4 free)</i>	<i>35-39</i> <i>Paying</i> <i>(+3 free)</i>	<i>30-34</i> <i>Paying</i> <i>(+3 free)</i>
CUSTOM TOUR (6 Nights / 8 Days) GALWAY, TRALEE, DUBLIN	\$3,608	\$3,709	\$3,712	\$3,798
Land Only (self-arranged round-trip airfare)	\$2,503	\$2,604	\$2,607	\$2,693

**Travel season dates are generally as follows: Low (23-Dec – 22-Mar, 2-Apr – 10-May, 10-Sep – 13-Dec); Shoulder (23-Mar – 31-Mar); High (11-May – 9-Sep, 14-Dec – 22-Dec); Travel seasons are subject to change without notice from the airline.*

The costs vary, depending upon the total number of paying participants sharing certain fixed overhead costs which include *chartered motorcoach, Tour Manager, guides, free trips, concert costs, etc.*

Marblehead Ireland above trip costs have been based on individual payments/individual accounting made directly to MCI.

To move forward, please submit your \$1500 non-refundable deposit to Music Celebrations International so that we can immediately begin work on the logistical and performance arrangements for your concert tour. We'll contact you within a few days to confirm your receipt of this material and address any questions you might have.



AMERICAN CELEBRATION OF MUSIC IN IRELAND
MUSIC CELEBRATIONS INTERNATIONAL
Cost Inclusions & Exclusions
MARBLEHEAD HIGH SCHOOL MUSIC DEPARTMENT

COST INCLUSIONS

- **AIRLINE TRANSPORTATION:** Round-trip transportation by scheduled airline carrier from **Boston, MA (BOS)**. Air fares are subject to change pending space availability at the time of group booking.
 - Includes up to \$550 for U.S. Government airline taxes, fees, and estimated fuel surcharge.
- **COACH TRANSPORTATION:** Local modern deluxe motorcoach transportation within Europe upon arrival and available for the entire tour.
- **CONCERT ARRANGEMENTS:** All performance and workshops are professionally provided in superior venues with attention to technical details and effective publicity.
- **ACCOMMODATIONS:** Hotel accommodations in superior tourist-class (4-star) hotels chosen for location, reputation, cleanliness, and service. The price is based on double occupancy, all rooms with private facilities. This offer is based on staying at the following accommodations, or similar:

GALWAY: *Salthill Hotel*

DUBLIN: *Clarion Liffey Valley*

TRALEE: *The Ashe Hotel*

- **MEALS:** As noted in the Tour itinerary. Please note that breakfast is not included on day of arrival and dinner is not included on day of departure.
- **ENTRANCE FEES:** Entrance fees/admissions are included to all sites, activities, tours, and excursions listed on the tour itinerary.
- **TOUR ITINERARIES:** Electronic versions of the tour itinerary are available listing hotel addresses, telephone and websites.
- **TOUR MANAGEMENT:** One full-time, multi-lingual Tour Manager will be on each motorcoach through the entire tour. MCI's European office staff is easily available 24 hours daily (even on weekends) to render assistance whenever needed.
- **EXCURSIONS:** Conducted by licensed, professional guides as outlined in the day-by-day Tour itinerary.
- **GRATUITIES:** All tips/gratuities to all motorcoach drivers, city/site guides, Tour Managers, hotel personnel (including hotel meals) and restaurant personnel are included.
- **INDIVIDUAL ACCOUNTING:** The above pricing reflects individual payments/individual billing made directly to MCI.
- **TRAVEL NOTES:** Pre-departure Travel Notes are available to each participant containing useful information about travel preparation, destination information, useful packing and cultural conditioning suggestions.
- **FREE TRIPS:** One free trip (based on double occupancy) for each 10 paying participants, is included.
- **LIABILITY INSURANCE:** \$3M MCI Tour Liability Insurance coverage.

COST EXCLUSIONS

- Travel Visa for non-U.S. passport holders, if applicable.
- Instrument, equipment, and/or music stand rental & cartage, if needed.
- Concert programs, if needed.
- Transportation to and from BOS airport.
- Drinks at dinners, beyond water/coffee/tea.
- Daily lunches.
- Airline luggage fees, if applicable.
- Difference between current and actual costs for the airline taxes and the estimated fuel surcharge, if applicable.

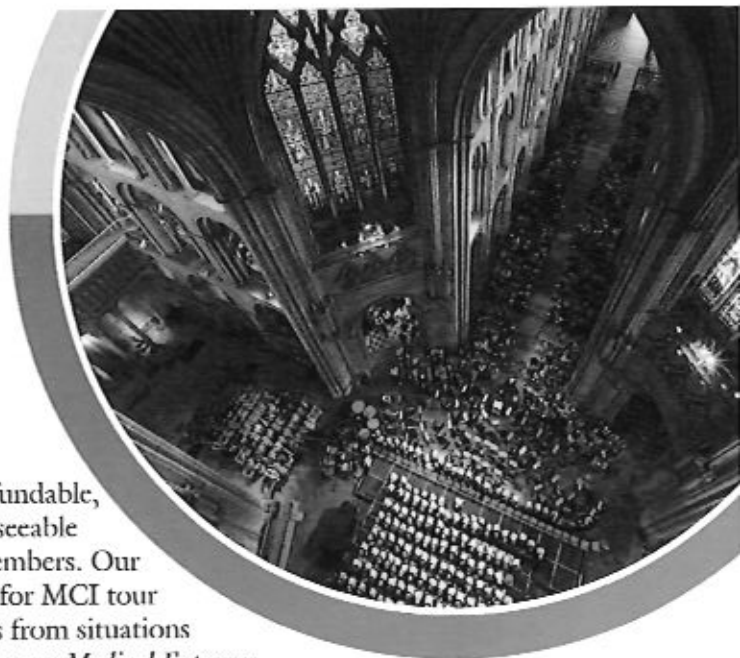


Music Celebrations International

Travel Protection

Because most airline tickets issued for group travel are nonrefundable, purchasing travel protection to protect oneself against unforeseeable events that may impact travel plans is encouraged for tour members. Our trusted partner, Trip Mate, has several travel protection plans for MCI tour members to purchase. These plans help protect tour members from situations such as *Trip Cancellation, Trip Interruption, Travel Delay, Emergency Medical Expenses, and more.*

For complete details and to purchase the plans, [click here](#).



WHAT TRAVEL PROTECTION COVERS

- **Trip Cancellation and Trip Interruption** provide coverage for cancellation or interruption of a trip due to reasons such as injury, illness or death suffered by the insured or a member of the insured's immediate family.
- **Medical Expense/Emergency Evaluation** can provide Medical Expense benefits for a covered Sickness or covered Injury incurred while on Your Trip. Under certain circumstances detailed in the plan, this covers the cost to transport you to a medical facility to treat a sickness or injury that is acute or life threatening.
- **Baggage & Personal Effects** provides coverage for loss, damage or theft of baggage and personal belongings. Tour members are encouraged to check to see if they are covered for baggage loss under their homeowner's policy.
- **Cancel For Any Reason Benefit (Plan #R774P only)*** gives tour members the option to cancel their tour for any reason up to 2 days prior to the scheduled departure date and be reimbursed 75% of the nonrefundable costs paid for their trip. CFAR coverage is not available to residents of the state of New York. Travel protection with CFAR needs to be purchased within 21 days of MCI's receipt of the first per person payment.

**Cancel for Any Reason Benefit is not available to NY Residents. Additional cost and terms apply*

WHAT THE TRAVEL PROTECTION PLAN OFFERS TOUR MEMBERS

Premier Travel Protection Options are available for tour members to purchase and includes:

- Increased Travel Delay benefit of \$300 per day, \$4,200 total. Should a tour member need to quarantine while on tour, this benefit may apply
- Up to \$50,000 of coverage for accident or sickness medical expenses
- Trip Cancellation coverage up to the insured Trip Cost
- Trip Interruption coverage up to 150% of the insured Trip Cost
- Up to \$1,500 of coverage for baggage and personal effects
- Up to \$750 of coverage for a baggage delay of 24 hours or more
- Up to \$1,500 of missed connection coverage
- Increased Accidental Death and Dismemberment coverage up to \$25,000
- Optional cancel for any reason coverage* (*not applicable to residents of the state of NY)

TRIPMATE:
1-833-297-2258

MUSIC CELEBRATIONS INTERNATIONAL:
1-800-395-2036



TRAVEL PROTECTION PLANS WITH AND WITHOUT CFAR

Travel Protection Benefits	Travel Protection Plan with CFAR (R774P)	Travel Protection Plan WITHOUT CFAR (R774D)
	Maximum Benefit Amount	
Trip Cancellation	Insured Trip Cost	Insured Trip Cost
Trip Interruption	150% of Trip Cost	150% of Trip Cost
Missed Connection	\$1,500	\$1,500
Travel Delay of 12 Hours or More	\$300 Per Day, \$4,200 Total	\$300 Per Day, \$4,200 Total
*Cancel for Any Reason Benefit	*75% of the Non-Refundable Trip Cost	*NOT AVAILABLE
Medical Expense/Emergency Evacuation	\$50,000	\$50,000
-Accident & Sickness Medical Expense		
-Emergency Medical Evacuation, Medical Repatriation & Return of Remains	\$500,000	\$500,000
Accidental Death & Dismemberment	\$25,000	\$25,000
Baggage and Personal Effects	\$1,500	\$1,500
Baggage Delay (24 Hours or More)	\$750	\$750

*Not available to residents of the state of New York

TRAVEL PROTECTION FAQ (Prepared by Trip Mate)

What is CFAR? What does CFAR cover?

CFAR stands for “cancel for any reason.” With CFAR tour members can cancel for any reason that is not a covered reason for Trip Cancellation by filing a claim for 75% of their *non-recoverable* investment. The request for cancellation must be received by MCP's office in writing up to 2 days prior to the tour's scheduled departure date.

Are doctors available on call through the travel protection plans?

Our plans include multi-lingual medical professionals available 24 hours a day to provide help, advice, and referrals for medical emergencies. They can help you locate local physicians, dentists, or medical facilities, and provide services for:

- Medical Consultation & Monitoring
- Medical Evacuation Arrangements
- Emergency Medical Payments
- Prescription Assistance
- Repatriation of Remains Arrangement
- 24-Hour Legal Assistance
- Language Interpretation Services
- Emergency Cash Transfer

Please Note: These are non-insurance services provided by Generali Global Assistance and not underwritten by US Fire Insurance Company

What is considered to be a covered quarantine?

“Quarantine” is a strict medical isolation imposed by a recognized government authority, their authorized deputies, a medical examiner or a physician to prevent the spread of a disease. An order is not considered to impose a strict medical isolation unless the order requires the relevant person to be confined twenty-four hours per day, seven days a week throughout its duration.

What happens if a tour member needs to quarantine on tour?

Our travel protection plan includes Travel Delay coverage with a benefit of up to \$4,200 total (\$300/day). If a tour member contracts the Coronavirus and needs to be quarantined (as defined above), Travel Delay provides coverage for additional expenses for reasonable accommodations, meal and local transportation expenses.

Is there a deadline for purchasing the Travel Protection Plan?

Tour members can purchase travel protection without CFAR (Travel Protection Plan R774D) up until 1 day prior to departure. Travel protection with CFAR (Travel Protection Plan R774P) needs to be purchased within 21 days of MCI’s receipt of the first per person payment.

Will a cancellation be covered if a tour member has to cancel prior to departure?

Only if the tour member is canceling for a covered reason as outlined in the plan documents. Purchasing a plan with “Cancel for Any Reason” (CFAR) is the best way for tour members to protect their investment.

Is CFAR/Cancel For Any Reason available to tour members from all 50 states?

Tour members from all US states, except New York, are eligible to file a claim under CFAR/Cancel For Any Reason.

If a tour member is a resident of the state of New York: is it worth it for them to buy travel protection if they cannot get CFAR/Cancel For Any Reason coverage?

Yes, it is worth it to buy travel protection. Even without CFAR/Cancel For Any Reason* coverage, tour members will still be eligible for the Trip Cancellation and Interruption benefit (which includes certain coverages during quarantine, as noted above), as well as multiple other benefits.

If a tour member lives in any state (other than New York), do they have a choice as to whether they buy the plan with CFAR or without CFAR?

Yes, tour members have a choice to either buy the plan with CFAR or without CFAR. Trip Mate highly recommends all eligible tour members to buy the plan with the CFAR coverage.

**Cancel for Any Reason Benefit is not available to NY Residents. Additional cost and terms apply*

What if an individual decides not to travel, but the group is moving forward?

If an individual decides not to travel but the group is moving ahead, you will follow MCI’s cancellation penalty structure for your group. Whatever the non-recoverable amount adds up to is what the individual tour member would file their claim for with Trip Mate. The individual can receive full reimbursement of their non-recoverable tour expenses if their reason for cancelling their tour is covered under the Trip Cancellation coverage. If the individual’s reason for cancelling their tour is not covered under the Trip Cancellation coverage, they can receive 75% reimbursement of non-recoverable tour expenses, provided they have purchased the plan with CFAR/Cancel For Any Reason coverage.

Where can tour members go for questions about the travel protection plans?

MCI can help with questions on pricing related to travel protection. However, if tour members have any coverage questions, they can reach out to the travel protection plan administrator, Trip Mate, a Generali Global Assistance & Insurance Services brand.

HOW DO TOUR MEMBERS CALCULATE THEIR PLAN COST?

To calculate a tour member's plan cost for the Travel Protection Plan, please visit the website below or scan the QR Code.

atc.tripassure.com/main/?welcome=MUSI1440AZ



INFORMATION YOU NEED TO KNOW

The following exclusions apply to both plans R774P and R774D: 1. suicide, attempted suicide or any intentionally self-inflicted injury of You, a Traveling Companion, Family Member or Business Partner booked to travel with You, while sane or insane; 2. an act of declared or undeclared war; 3. participating in maneuvers or training exercises of an armed service, except while participating in weekend or summer training for the reserve forces of the United States, including the National Guard; 4. riding or driving in races, or speed or endurance competitions or events; 5. mountaineering (engaging in the sport of scaling mountains generally requiring the use of picks, ropes, or other special equipment); 6. participating as a professional in a stunt, athletic or sporting event or competition; 7. participating in skydiving or parachuting except parasailing, hang gliding, bungee cord jumping, extreme skiing, skiing outside marked trails or heli-skiing, any race, speed contests not including any of the regatta races, spelunking or caving, or scuba diving if the depth exceeds 120 feet (40 meters) or if You are not certified to dive and a dive master is not present during the dive; 8. piloting or learning to pilot or acting as a member of the crew of any aircraft; 9. being Intoxicated as defined herein, or under the influence of any controlled substance unless as administered or prescribed by a Legally Qualified Physician; 10. the commission of or attempt to commit a felony or being engaged in an illegal occupation; 11. normal childbirth or pregnancy (except Complications of Pregnancy) or voluntarily induced abortion; 12. due to a Pre-Existing Condition, as defined in the Plan. The Pre-Existing Condition Limitation does not apply to the Emergency Medical Evacuation or Return of Remains coverage; 13. any amount paid or payable under any Worker's Compensation, Disability Benefit or similar law; 14. a loss or damage caused by detention, confiscation or destruction by customs; 15. Elective Treatment and Procedures; 16. medical treatment during or arising from a Trip undertaken for the purpose or intent of securing medical treatment; 17. business, contractual or educational obligations of You, a Family Member, Business Partner, or Traveling Companion; 18. a mental or nervous condition, unless hospitalized for that condition while the Plan is in effect for You; 19. a loss that results from a Sickness, Injury, disease or other condition, event or circumstance which occurs at a time when the Plan is not in effect for You; 20. Bankruptcy or Default or failure to supply services by a supplier of travel services; 21. due to loss or damage (including death or injury) and any associated cost or expense resulting directly from the discharge, explosion or use of any device, weapon or material employing or involving chemical, biological, radiological or similar agents, whether in time of peace or war, and regardless of who commits the act and regardless of any other sequence thereto; or 22. an assessment from a Legally Qualified Physician advising You in writing that You, a Traveling Companion, Family Member or Business Partner booked to travel with You are not Medically Fit to Travel, as defined in the Plan, at the time of purchases of Coverage on Your Trip. Additional Limitations and Exclusions Specific to Baggage and Personal Effects: Benefits are not payable for any loss caused by or resulting from: a) breakage of brittle or fragile articles; b) wear and tear or gradual deterioration; c) confiscation or appropriation by order of any government or custom's rule; d) theft or pilferage while left in any unlocked vehicle; e) property illegally acquired, kept, stored or transported; f) Your negligent acts or omissions; g) Your property shipped as freight or shipped prior to the Scheduled Departure Date; h) electrical current, including electric arcing that damages or destroys electrical devices or appliances.

Excess Insurance: The insurance provided by this Plan (except Accident and Sickness Medical Expense, Emergency Medical Evacuation, Medical Repatriation and Return of Remains) shall be in excess of all other valid and collectible Insurance or indemnity. If at the time of the occurrence of any loss there is other valid and collectible insurance or indemnity in place, We shall be liable only for the excess of the amount of loss, over the amount of such other insurance or indemnity, and applicable deductible. The Coordination of Benefits ("COB") provision applies to This Plan when an Insured has health care coverage under more than one Plan.

This advertisement contains highlights of the plans developed by Trip Mate, a Generali Global Assistance & Insurance Services brand, which include travel insurance coverages underwritten by United States Fire Insurance Company, Principal Office located in Morristown, New Jersey, under form series T7000 et al, T210 et al and TP-401 et al provided by Generali Global Assistance, FootprintID® and Blue Ribbon Bags. The terms of insurance coverages in the plans may vary by jurisdiction and not all insurance coverages are available in all jurisdictions. Insurance coverages in these plans are subject to terms, limitations and exclusions including an exclusion for pre-existing medical conditions. In most states, your travel retailer is not a licensed insurance producer/agent and is not qualified or authorized to answer technical questions about the terms, benefits, exclusions and conditions of the insurance offered or to evaluate the adequacy of your existing insurance coverage. Your travel retailer may be compensated for the purchase of a plan and may provide general information about the plans offered, including a description of the coverage and price. The purchase of travel insurance is not required in order to purchase any other product or service from your travel retailer. CA DOI toll-free number is 800-927-4357. The cost of your plan is for the

TRIPMATE:
1-833-297-2258

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1-800-395-2036



entire plan, which consists of both insurance and non-insurance components. Individuals looking to obtain additional information regarding the features and pricing of each travel plan component, please contact Trip Mate, a Generali Global Assistance & Insurance Services brand, P.O. Box 527, Hazelwood, MO 63042; 1-833-297-2255; assistancefees@tripmate.com. We are licensed in all states. While Trip Mate markets the travel insurance in these plans on behalf of USF, non-insurance components of the plans were added to the plans by Trip Mate, and Trip Mate does not receive compensation from USF for providing the non-insurance components of the plans.

TRIPMATE:
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1-800-395-2036





Assure Tour & Cruise Plan Quotation

Quote Date: 02/15/2024

Thank you for requesting a Trip Mate quote. Have questions? You can view many Frequently Asked Questions at atc.tripassure.com, or call a Trip Mate Customer Service Representative at:

Customer Service:
1-833-297-2258

Satisfaction Guarantee - If You purchase this Plan and You are not satisfied with Your Plan for any reason, You may return the Plan Documents and the Purchase Confirmation to Trip Mate within 14 days of receipt. Your plan payment (less any enrollment fees charged, where applicable) will be refunded, provided You have not filed a claim or departed on Your Trip. When so returned, the Plan Documents are void from the beginning.

Time Sensitive Provisions - If You purchase this Plan within 21 days of the date Your initial Payment or Deposit for Your Trip is received, then: 1) the Plan exclusion for Pre-Existing Conditions will be waived, provided You are not disabled from travel at the time Your plan payment is paid; and 2) there is coverage for Bankruptcy or Default of an airline, cruise line, tour operator or travel supplier (other than the Travel Supplier from whom You purchased Your Travel Arrangements) causing a complete cessation of travel services more than 14 days following Your Effective Date.

Insure The Full Cost of Your Trip - If You insure an amount less than 100% of the cost of all Your Prepaid Trip costs that are subject to cancellation penalties or restrictions: 1) the maximum benefit for Trip Cancellation will be limited to the amount of coverage You purchase; 2) the maximum benefit for Trip Interruption will be 150% of the amount of coverage You purchase; and 3) there will be no coverage for Bankruptcy or Default of an airline, cruise line, tour operator or travel supplier.

Generali Global Assistance - Generali Global Assistance provides: medical, legal and travel assistance services available 24 hours a day/365 days a year. A complete list of these services is available at atc.tripassure.com.

Wishing you an enjoyable trip!

Non-Insurance Services

Generali Global Assistance
FootprintID® Medical Records Service
Blue Ribbon Bags

Quote Details	
Quote Name:	sample student music ireland
Agency ID#:	MUSI1440AZ
Organization Name:	Music Celebrations International
Product:	Deluxe Plan
Plan #:	R774D

Plan Payment by Traveler				
Traveler #	Age	Trip Dates	Trip Cost	Plan Payment
1	16	04/20/2025-04/27/2025	\$3,798	\$247.00
			Total Plan Cost	\$247.00
This amount is for the entire plan, which includes non-insurance assistance services.				

Schedule of Benefits	
Plan Benefits	Maximum Benefit Amount
Trip Cancellation.....	Trip Cost
Trip Interruption.....	150% of Trip Cost
Missed Connection.....	\$1,500
Travel Delay (Up to \$300 Per Day).....	\$4,200
Medical Expense/Emergency Evacuation	
Accident and Sickness Medical Expense.....	\$50,000
Emergency Evacuation and Repatriation.....	\$500,000
Accidental Death and Dismemberment.....	\$25,000
Baggage and Personal Effects.....	\$1,500
Baggage Delay (Up to \$250 Per Day).....	\$750

The Travel Insurance Benefits of this Plan are Underwritten By: United States Fire Insurance Company.

Plan Administrator: Generali Global Assistance & Insurance Services
P.O. Box 527, Hazelwood, MO, 63042, 1-833-297-2258.

Please Note: Plan payments, benefits and Plan information are valid as of the Quote Date above and are subject to change at any time.

This document provides a brief summary of the plan. If there is a conflict between this document and a plan provision, the plan provision shall prevail.



Assure Tour & Cruise Plan Quotation

Quote Date: 02/15/2024

Thank you for requesting a TripAssure quote. Have questions? You can view many Frequently Asked Questions at atc.tripassure.com, or call a TripAssure Customer Service Representative at:

Customer Service:
1-833-297-2258

Satisfaction Guarantee - If You purchase this Plan and You are not satisfied with Your Plan for any reason, You may return the Plan Documents and the Purchase Confirmation to TripAssure within 14 days of receipt. Your plan payment (less any enrollment fees charged, where applicable) will be refunded, provided You have not filed a claim or departed on Your Trip. When so returned, the Plan Documents are void from the beginning.

Time Sensitive Provisions - If You purchase this Plan within 21 days of the date Your initial Payment or Deposit for Your Trip is received, then: 1) the Plan exclusion for Pre-Existing Conditions will be waived, provided You are not disabled from travel at the time Your plan payment is paid; 2) there is coverage for Bankruptcy or Default of an airline, cruise line, tour operator or travel supplier (other than the tour operator or travel agency from whom You purchased Your Travel Arrangements) causing a complete cessation of travel services more than 14 days following Your Effective Date; and 3) coverage is available under the Cancel For Any Reason Benefit.

Insure The Full Cost of Your Trip - If You insure an amount less than 100% of the cost of all Your Prepaid Trip costs that are subject to cancellation penalties or restrictions: 1) the maximum benefit for Trip Cancellation will be limited to the amount of coverage You purchase; 2) the maximum benefit for Trip Interruption will be 150% of the amount of coverage You purchase; 3) there will be no coverage for Bankruptcy or Default of an airline, cruise line, tour operator or travel supplier; and 4) there will be no coverage available under the Cancel For Any Reason Benefit.

Cancel For Any Reason Benefit - If You purchase this Plan within 21 days of the date Your initial Payment or Deposit for Your Trip is received, it allows You to cancel Your Trip for ANY reason not otherwise covered by the Plan Documents and be reimbursed for 75% of the unused non-refundable prepaid expenses for Travel Arrangements You paid for Your Trip, provided You insure 100% of Your Prepaid Trip costs that are subject to cancellation penalties or restrictions and cancel Your Trip two (2) days or more before Your Scheduled Trip Departure Date.

Generali Global Assistance - Generali Global Assistance provides: medical, legal and travel assistance services available 24 hours a day/365 days a year. A complete list of these services is available at atc.tripassure.com.

Wishing you an enjoyable trip!

Non-Insurance Services

Generali Global Assistance
FootprintID® Medical Records Service
Blue Ribbon Bags

Quote Details

Quote Name: sample student music ireland
Agency ID#: MUSI1440AZ
Organization Name: Music Celebrations International
Product: Deluxe Plus Plan
Plan #: R774P

Plan Payment by Traveler

Traveler #	Age	Trip Dates	Trip Cost	Plan Payment
1	16	04/20/2025-04/27/2025	\$3,798	\$395.00

Total Plan Cost \$395.00

This amount is for the entire plan, which includes non-insurance assistance services.

Schedule of Benefits

Plan Benefits	Maximum Benefit Amount
Trip Cancellation.....	Trip Cost
Trip Interruption.....	150% of Trip Cost
Missed Connection.....	\$1,500
Travel Delay (Up to \$300 Per Day).....	\$4,200
Cancel For Any Reason.....	75% of Non-Refundable Trip Cost
Medical Expense/Emergency Evacuation	
Accident and Sickness Medical Expense.....	\$50,000
Emergency Evacuation and Repatriation.....	\$500,000
Accidental Death and Dismemberment.....	\$25,000
Baggage and Personal Effects.....	\$1,500
Baggage Delay (Up to \$250 Per Day).....	\$750

The Travel Insurance Benefits of this Plan are Underwritten By: United States Fire Insurance Company.

Plan Administrator: Generali Global Assistance & Insurance Services P.O. Box 527, Hazelwood, MO, 63042, 1-833-297-2258.

Please Note: Plan payments, benefits and Plan information are valid as of the Quote Date above and are subject to change at any time.

This document provides a brief summary of the plan. If there is a conflict between this document and a plan provision, the plan provision shall prevail.

MARBLEHEAD HIGH SCHOOL
MUSIC DEPARTMENT
American Celebration of Music Concert
Series in Ireland

Custom 2025 Tour (6 NIGHTS/8 DAYS)

Day 1

Depart from Boston via scheduled air service to Dublin, Ireland

Day 2

Dublin / Galway

(D)

Morning arrival in Dublin

Meet your MCI Tour Manager, who will assist the group to the awaiting chartered motorcoach

Transfer to Galway with a stop at Rathbaun farm for a sheepdog demonstration. At Rathbaun Farm, the timeless art of sheep herding comes to life in an engaging and educational sheepdog demonstration. This captivating experience allows visitors to witness the incredible skills of highly trained Border Collies as they work in harmony with their handlers to guide and control a flock of sheep. Also enjoy some tea and scones

Continue to Galway for late afternoon hotel check-in

Evening 3-course Welcome Dinner at the hotel restaurant and overnight

Galway is picturesquely situated at the northeast end of Galway Bay, at the point where the short tidal River Corrib, coming from Lough Corrib, pours its abundant flow of water into the Atlantic. With its narrow streets, old stone and wooden shopfronts, good restaurants and bustling pubs, it is one of Europe's fastest growing cities and ranks fourth in size in Ireland, after Dublin, Cork and Limerick.

Day 3

Connemara / Galway

(B,D)

Full Irish Breakfast at the hotel

Journey into Connemara with a visit to Kylemore Abbey. The architecture is best described as neo-gothic and the house still displays all the characteristics of that period. One of Kylemore Abbey's most famous features is its miniature cathedral, built in 1870 and known locally as the Gothic church. Today, the abbey is home to the Irish order of Benedictine nuns

Lunch, on own

Enjoy some afternoon free time at leisure for shopping

*Marblehead High School Music Department Concert in Saint Nicholas' Collegiate Church, or similar, as part of the American Celebration of Music Concert Series in Ireland**

2-course dinner at a local pub or restaurant

Return to the hotel for overnight

Day 4

Cliffs of Moher / County Kerry

(B,D)

Full Irish Breakfast at the hotel, followed by check-out

Enjoy an excursion to the Cliffs of Moher, one of Ireland's most spectacular sights. The Cliffs are a breathtaking natural wonder overlooking the Atlantic Ocean. These majestic cliffs stretch for about 14 kilometers (8.7 miles) along



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the rugged coastline of County Clare. Rising to heights of up to 214 meters (702 feet) at their highest point. A visitor center near the cliffs provides information about the geological and natural history of the site. It also offers facilities such as walking paths, viewing platforms, and a shop. The Cliffs of Moher have become one of Ireland's most iconic and visited attractions, drawing tourists from around the world who come to experience the awe-inspiring beauty of this coastal marvel.

Lunch, on own

Afternoon transfer to County Kerry via the Shannon Car Ferry

Continue to County Kerry for hotel check-in

Evening 3-course dinner at the hotel restaurant and overnight

Day 5**Ring of Kerry / County Kerry****(B)**

Full Irish Breakfast at the hotel

Enjoy a tour of the Ring of Kerry Highlights including Moll's Gap and Ladies View. Moll's Gap is a spectacular photographic viewing with a magnificent view of Death Valley. Close by is the famous Ladies View viewing point which gives a different perspective of the countryside, with the three Lakes of Killarney all surrounded by the Kerry Mountains

Meet our horse-drawn jaunting cars at Ross Castle for a scenic ride through Killarney National Park ending in Killarney city center

Lunch, on own

Afternoon at leisure with dinner, on own

*Marblehead High School Music Department Concert in St. Mary's Church of Ireland, or similar, as part of the American Celebration of Music Concert Series in Ireland**

Return to the hotel for overnight

Day 6**Blarney / Dublin****(B,D)**

Full Irish Breakfast at the hotel, followed by check-out

Visit Blarney Castle. The castle dates from 1446 and is built on solid limestone in beautiful grounds. The sacred stone is found at the top of the castle and when you catch a glimpse of it, you may feel compelled to bend over backwards and kiss it!

Lunch, on own

Continue to Dublin for hotel check-in

Enjoy dinner and traditional Irish entertainment at *The Merry Ploughboy* or *Taylor's Three Rock*

Return to the hotel for overnight

Dublin is Ireland's capital and its largest, most cosmopolitan city. It wasn't before the Viking raids of the 9th century that Dublin was fully established. The "boom years" came in the 18th century and the city expanded across the river forming a new Dublin of stately squares, streets and Georgian mansions. Today, with its elegant Georgian streets, gregarious inhabitants and over one thousand years of history, it's little wonder Dublin is a city of writers

Day 7**Dublin****(B,D)**

Full Irish Breakfast at the hotel

Option A: Visit Trinity College & the Book of Kells. Trinity was founded in 1592 by Queen Elizabeth 1st on grounds confiscated from an Augustinian priory and is the oldest university in Ireland. The Campanile, erected in 1852, was built on what is believed to be the centre of the monastery. Built to further

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the education of the ruling Anglo-Irish families, restrictions were imposed to prevent Catholic from attending courses. These restrictions were not fully lifted until the 1970's. Trinity however admitted women in 1902, earlier than most British universities. Most of the main buildings off the main square were built during the Georgian period, some of which replaced older buildings

Option B: Visit to **EPIC Ireland**, the Irish Emigration Museum – A state of the art interactive museum experience located in the beautiful vaults of the 1820 Custom House building in Dublin's Docklands. This is the original departure point for so many of Ireland's emigrants. Nearly 37 Million U.S. Citizens list their heritage as Irish (Over 8 times the current population of Ireland). At **EPIC**, there are twenty themed galleries to find out why people left, who they were, see how they influenced the world they found, and experience the connection between their descendants and Ireland today

Lunch, on own

*Marblehead High School Music Department lunchtime concert in St. Patrick's Cathedral, the National Cathedral of Ireland, or similar, as part of the American Celebration of Music Concert Series in Ireland**

2-course dinner at a local pub or restaurant

Return to the hotel for overnight

Day 8

Depart for home

(B)

Breakfast at the hotel, followed by check-out

Transfer to the Dublin Airport for return flight home

Arrive home to Boston, the same day as your departure from Ireland

** Subject to availability and confirmation*

This is a very flexible itinerary. Except for confirmed appointments and performances, the places of interest and the sequence of sightseeing might be changed if necessary or desirable. In the event of an unavoidable conflict in the performance and the sightseeing schedule, the concert schedule will prevail, and it may be necessary to exclude some sightseeing activities.

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MEMO Re : School Committee requests for 2025 travel

- Requested by Mary Francois, MHS French Teacher and Candice Sliney, MHS Spanish Teacher
- Referring to 2 trips (one to Spain and one to France) in 2025 with the MHS WL Department

1. LOCATION : Please see PDFs for specifics on cities in Spain and France.

2. DATES : Please see PDF for specifics. (Spain trip = Feb vacation, France trip = April vacation)

3. ANTICIPATED NUMBER TRAVELING : Ideally we have a minimum of 20 participants but no more than 25. We have a free chaperone for every 6 participants.

4. COST : Please see PDF. This price is consistent with international educational trips. We also choose to travel with ACIS because of their commitment to quality travel and the top reviews the company receives versus other companies. Costs have also greatly increased due to increasing travel costs. We are committed to helping students fundraise.

5. TRAVEL INSURANCE : The highest level of insurance allows families to cancel for any reason and get a full refund along with the most enhanced coverage for trip delays, lost baggage, health coverage and program interruptions. The lowest level of insurance provides some refund for cancellation up to a certain point before travel. It provides some assistance for interrupted travel and travel delays and has a \$200 deductible for health costs. (Full insurance details attached.)

- Evacuation insurance is a part of all ACIS plans for medical or security reasons. Details are included.

6. FUNDRAISING : I encourage students to participate in fundraising and I will organize fundraising activities for the group if students agree to participate. ACIS offers scholarships and fundraising assistance.

7. CURRICULUM CONNECTION : Travel and being in a francophone/spanish speaking place is an essential part of our curriculum and offering these opportunities is a part of our state frameworks. I chose this particular trip because of the enhanced language and cultural experiences. It is a "language immersion" trip which means the tour guide will speak in French/Spanish and we will have mini lessons for the day based on the location and activities. Students are encouraged to speak in French/Spanish as much as possible. There are also a variety of cultural activities. We can also attest to the amazing reception and feedback from students/families on the past trips and the influences they had on MHS students.

8. ROOMING : Most hotels will offer double rooms (2 students, 2 beds). We plan in advance of trips a rooming arrangement based on doubles and triples. Students/families request their rooming situation. No one is forced to share a bed. Though ACIS's standard plan could be triples, it is most likely that based on the smaller hotels we go to, there are only doubles. Families who are concerned may however pay an extra fee to ensure a single or double room.



FEB 14-23, 2025

Group Leader
Candice Sliney

Group Leader ID
244719

Andalusian Fiesta

WHAT'S INCLUDED

- ✈ Round-Trip Flights
- 🍳 Daily Breakfast and Dinner (unless otherwise noted)
- 🏨 3- or 4-Star Hotels
- 👤 24-Hour Tour Manager
- 🏠 Centrally Located Hotels
- 🌟 Start Exploring
- 🌐 Global Network
- 🚗 All Local Transportation
- 🎧 Personal Headsets Included Throughout Tour
- 🗺 Toledo Tour with Guide
- 🏰 Toledo Gothic Cathedral, Synagogue, Church of Santo Tomé
- 🎭 Flamenco Lesson, Dinner and Show In Granada
- 🏰 Granada Tour with Guide
- 🏰 Alhambra and Generalife Gardens Tour with Guide
- 🏰 Ronda Tour with Guide
- 🏰 Ronda Bullring
- 🏰 Seville Tour with Guide
- 🏰 Seville Cathedral and Giralda Tower
- 🏰 Córdoba Tour with Guide
- 🏰 Córdoba Mezquita with Audio Guides
- 🍲 Paella Dinner
- 🗺 Madrid Tour with Guide
- 🏰 Prado Museum with Guide and Reservation
- 🏰 Reina Sofia Museum

TRIP ITINERARY

10 Days | Overnights: Overnight Flight (1), Toledo (2), Granada (1), Ronda (1), Seville (2), Madrid (2)



OUR PROMISE

Travel Changes Lives

In educational travel, every moment matters. Pushing the experience from "good enough" to exceptional is what we do every day. Our mission is to empower educators to introduce their students to the world beyond the classroom and inspire the next generation of global citizens.





ACIS TRIPSITE

Scan the code to view your group's Tripsite and learn more details about your upcoming trip, and to register!

Get Started Today

REGISTER:

Scan the above QR code or visit www.acis.com/findmytrip and enter your Group Leader's ID and last name and click Register Now when you're ready to sign up.

TOUR COST

Depart From: Boston

Cost per Traveler

\$4420

\$451 per month using an automatic payment plan

Full Payment Deadline

11/1/2024

Cost Breakdown

Program Fee **\$4514**

Early Registration Discount **-\$100**

Weekend Surcharge **\$80**

Value Trip Discount through 4/1/24 **-\$200**

Prepaid Tipping **\$126**

Total Cost \$4420

Valid through 4/1/2024

Additional Fees (as applicable)

Adult Surcharge **\$100**

Single Room Supplement **\$880**

Double Room Supplement **\$480**

Ultimate Protection Plan **\$350**

Ultimate-Plus Protection Plan **\$500**

Aranjuez **\$55**

Triana Ceramic Tile Workshop **\$50**

NOTES FROM ACIS

Save \$50 off your Total Participant Fees if you pay for your trip through E-Check or our Automatic Payments Plan.

All registered participants can enjoy the convenience and savings of having payments automatically withdrawn from a checking account with an Automatic Payment Plan. To learn more, visit acis.com/autopay.

Adult travelers over 21 should add in the Adult Surcharge and Double or Single Room Supplement to calculate Total Cost.

This educational travel program is not school or district sponsored unless expressly stated by the Group Leader.

QUESTIONS?

Find answers to our most frequently asked questions at www.acis.com/faqs or contact Traveler Support via Live Chat on acis.com or email accounts@acis.com.

APR 18-26, 2025

Group Leader
Mary Francois

Group Leader ID
226994

acis

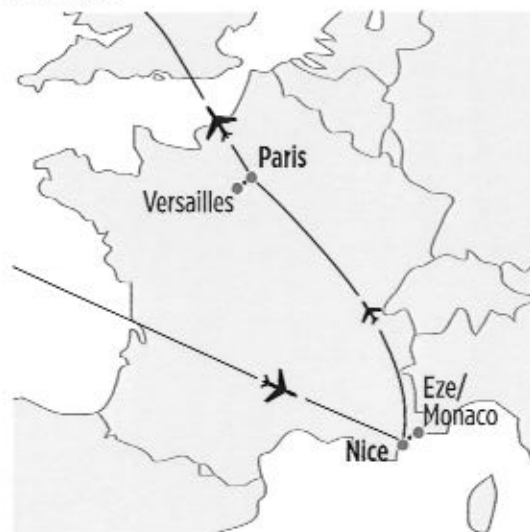
Language Immersion in France

WHAT'S INCLUDED

- ✈ Round-Trip Flights
- ✈ Daily Breakfast and Dinner (unless otherwise noted)
- ✈ 3- or 4-Star Hotels
- ✈ 24-Hour Tour Manager
- ✈ Centrally Located Hotels
- ✈ Start Exploring
- ✈ Global Network
- ✈ All Local Transportation
- ✈ Personal Headsets Included Throughout Tour
- ✈ Pétanque Lesson in Nice
- ✈ Jardin Exotique
- ✈ Fragonard Perfume Factory Tour
- ✈ Nice-Paris Flight
- ✈ Paris Tour with Guide
- ✈ Louvre with Guide and Reservation
- ✈ French Theater Performance with Surtitles
- ✈ Visit with Local Students in Paris
- ✈ Paris Dinner Voucher
- ✈ Versailles Château and Gardens
- ✈ Versailles Le Hameau and Petit Trianon
- ✈ Versailles by Bike
- ✈ Eiffel Tower Top Floor

TRIP ITINERARY

9 Days | Overnights: Overnight Flight (1), Nice (3), Paris (4)



OUR PROMISE

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ACIS TRIPSITE

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TOUR COST

Depart From: Boston

Cost per Traveler

\$5596

\$458 per month using an automatic payment plan

Full Payment Deadline

12/1/2024

Cost Breakdown

Program Fee	\$5504
Early Registration Discount	-\$100
Weekend Surcharge	\$80
Prepaid Tipping	\$112
Total Cost	\$5596
Valid through 4/1/2024	

Additional Fees (as applicable)

Adult Surcharge	\$100
Single Room Supplement	\$770
Double Room Supplement	\$420
Ultimate Protection Plan	\$315
Ultimate-Plus Protection Plan	\$450

NOTES FROM ACIS

Save \$50 off your Total Participant Fees if you pay for your trip through E-Check or our Automatic Payments Plan.

All registered participants can enjoy the convenience and savings of having payments automatically withdrawn from a checking account with an Automatic Payment Plan. To learn more, visit acls.com/autopay.

Adult travelers over 21 should add in the Adult Surcharge and Double or Single Room Supplement to calculate Total Cost.

This educational travel program is not school or district sponsored unless expressly stated by the Group Leader.

Get Started Today

REGISTER:

Scan the above QR code or visit www.acls.com/findmytrip and enter your Group Leader's ID and last name and click Register Now when you're ready to sign up.

QUESTIONS?

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World Class Coverage Plan

designed for

ACIS

2023

Policy # CC008313

Administered by Cultural Insurance Services International • 1 High Ridge Park • Stamford, CT 06905-1322
This plan is underwritten by Crum & Forster SPC

Schedule of Benefits Coverages and Services	Maximum Limits	
	BASIC PLAN	ULTIMATE/ULTIMATE-PLUS PLANS
Travel Accident Indemnity Insurance		
Accidental Death and Dismemberment:	\$25,000	\$25,000
Accident and Sickness Insurance		
Medical Expenses (per Covered Accident or Sickness):	\$15,000 @ 100% \$200 Deductible	\$50,000 @ 100% \$0 deductible
Extension of Benefits:	7 Days	7 Days
Travel Assistance Insurance		
Emergency Medical Reunion Maximum:	not covered	\$1,500
Includes lodging/meals up to:		\$100 per day
Participant must be hospitalized for:		48 hours
Trip Delay (per Person):	\$1,500	\$1,500
Per Day:	\$150	\$150
Trip Interruption:	\$250	\$1,500
Personal Property Insurance		
Personal Property Benefit:	not covered	\$1,000
Deductible:		\$50 deductible
Per Item:		\$200 per item
Baggage Delay:	not covered	\$50 (24 hours delayed)
Evacuation and Repatriation Insurance		
Applies to Basic, and Ultimate/Ultimate-Plus Plans:		
Emergency Medical Evacuation	up to	\$250,000
Repatriation/Return of Mortal Remains	up to	\$250,000
Security Evacuation (Comprehensive)	up to	\$100,000 (\$2.5M aggregate)
Non-Insurance Services		
Team Assist Plan (TAP): 24/7 medical, travel, technical assistance		

Benefits are provided for eligible Insured Persons. Terms and conditions are briefly outlined in this summary of coverage. Complete provisions pertaining to this insurance are contained in the policy. In the event of any conflict between this summary of coverage and the policy, the policy will govern. The policy is a short-term limited duration policy renewable only at the option of the insurer. This is a brief description of the important features of the insurance plan. It is not a contract of insurance. The terms and conditions of coverage are set forth in the Plan issued to your school. For a detailed plan description, exclusions, and limitations please view the plan on file with your school. This insurance is not subject to, and will not be administered as a PPACA (Patient Protection and Affordable Care Act) insurance plan. PPACA requires certain US residents and citizens obtain PPACA compliant insurance coverage. This plan is not designed to cover US residents and citizens. This policy is not subject to guaranteed issuance or renewal. PPO Networks are not provided by Crum & Forster SPC.

Benefit Provisions

Benefits are payable under the Policy for Covered Expenses incurred by an Insured Person for the items stated in the *Schedule of Benefits*. Benefits shall be payable to either the Insured Person or the Service Provider for Covered Expenses incurred Worldwide, except in the United States or your Home Country. The first such expense must be incurred by an Insured Person within 30 days after the date of the Covered Accident or commencement of the Sickness; and

- All expenses must be incurred by the Insured Person within 364 days from the date of the Covered Accident or commencement of the Sickness; and
- The Insured Person must remain continuously insured under the Policy for the duration of the treatment.

The charges enumerated herein shall in no event include any amount of such charges which are in excess of Reasonable and Customary charges. If the charge incurred is in excess of such average charge such excess amount shall not be recognized as a Covered Expense. All charges shall be deemed to be incurred on the date such services or supplies, which give rise to the expense or charge, are rendered or obtained.

An Eligible Person will be insured on the latest of: 1) the Policy Effective Date; 2) the date he or she is eligible; or 3) the date requested by ACIS. This coverage will begin on the actual start of the trip. It will end on the date the Insured Person returns to his or her Home Country or Permanent Residence. An Insured Person's coverage will end on the earliest of the date: 1) the policy terminates; 2) the insured Person is no longer eligible; 3) of the last day of the term of Coverage, requested by the Participating Organization, applicable to the Insured Person; or 4) the period ends for which premium is paid.

Accidental Death and Dismemberment Benefit

Accidental Death Benefit. If Injury to the Insured Person results in death within 365 days of the date of the Covered Accident that caused the Injury, We will pay 100% of the Benefit Amount.

Accidental Dismemberment Benefit. If Injury to the Insured Person results, within 365 days of the date of the Covered Accident that caused the Injury, in any one of the Losses specified below, We will pay the percentage of the Benefit Amount shown below for that Loss:

For Loss of:	Percentage of Maximum Amount:
Life	100%
Two or more Members	100%
Speech and Hearing in Both Ears One Member	100%
Speech or Hearing in Both Ears	50%
Hearing in One Ear	25%
Thumb and Index Finger of the Same Hand	25%

"Member" means Loss of Hand or Foot and Loss of Sight. "Loss of Hand or Foot" means complete Severance through or above the wrist or ankle joint. "Loss of Sight" means the total, permanent Loss of Sight of one eye. "Loss of Speech" means total and permanent loss of audible communication that is irrecoverable by natural, surgical or artificial means. "Loss of Hearing" means total and permanent Loss of Hearing in an ear that is irrecoverable and cannot be corrected by any means. "Loss of a Thumb and Index Finger of the Same Hand" means complete Severance through or above the metacarpophalangeal joints of the same hand (the joints between the fingers and the hand). "Severance" means the complete separation and dismemberment of the part from the body. If more than one Loss is sustained by an Insured Person as a result of the same Covered Accident, only one amount, the largest, will be paid. Maximum aggregate benefit per occurrence is \$1,000,000.

Accident and Sickness Medical Expenses

We will pay Covered Expenses due to Accident or Sickness only, as per the limits stated in the *Schedule of Benefits*. Coverage is limited to Covered Expenses incurred subject to Exclusions. All bodily Injuries sustained in any one Covered Accident shall be considered one Disablement, all bodily disorders existing simultaneously which are due to the same or related causes shall be considered one Disablement. If a Disablement is due to causes which are the same or related to the cause of a prior Disablement (including complications arising there from), the Disablement shall be considered a continuation of the prior Disablement and not a separate Disablement.

Treatment of an Injury or Sickness must occur within 30 days of the Accident or onset of the Sickness.

When a Covered Injury or Sickness is incurred by the Insured Person, We will pay Reasonable and Customary medical expenses as stated in the *Schedule of Benefits*. In no event shall Our maximum liability exceed the maximum stated in the *Schedule of Benefits* as to Covered Expenses during any one period of individual coverage.

Covered Accident and Sickness Medical Expenses

Only such expenses, incurred as the result of a covered Accident or Sickness, which are specifically enumerated in the following list of charges, and which are not excluded in the Exclusions section, shall be considered as Covered Expenses:

- Charges made by a Hospital for room and board (\$300 per day max), floor nursing and other services inclusive of charges for professional service and with the exception of personal services of a non-medical nature.
- Charges made for Intensive Care or Coronary Care charges and nursing services. Room and board accommodations are limited to \$600 per day.
- Charges made for diagnosis, treatment and surgery by a Doctor.
- Charges made for an operating room.
- Charges made for outpatient treatment, same as any other treatment covered on an inpatient basis. This includes ambulatory surgical centers, Doctors' outpatient visits/examinations, clinic care, and surgical opinion consultations.
- Charges made for the cost and administration of anesthetics.
- Charges for medication, x-ray services, laboratory tests and services, the use of radium and radioactive isotopes, oxygen, blood, transfusions, iron lungs, and medical treatment.
- Dressings, drugs, and medicines that can only be obtained upon a written prescription of a Doctor or surgeon.
- Charges made for artificial limbs, eyes, larynx, and orthotic appliances, but not for replacement of such items.
- Local transportation to or from the nearest Hospital or to and from the nearest Hospital with facilities for required treatment. Such transportation shall be by licensed ground ambulance only.
- Charges for physiotherapy, if recommended by a Doctor for the treatment of a specific Disablement and administered by a licensed physiotherapist.
- Chiropractic Care and Therapeutic Services shall be limited to a total of \$50 per visit, excluding x-ray and evaluation charges, with a maximum of 10 visits per injury or Sickness. The overall maximum coverage per injury or Sickness is \$500 which includes x-ray and evaluation charges.

Extension of Benefits

Medical benefits are automatically extended 7 days after expiration of Insurance for conditions first diagnosed or treated during or related to your overseas study program with ACIS. Benefits will cease at 12:00 a.m. on the 8th day following Termination of Insurance. Benefits are only payable to the extent that Covered Expenses are not payable under any other domestic health care plan.

Emergency Medical Reunion Benefit

(Ultimate/Ultimate-Plus Plans Only)

When an Insured Person is hospitalized for more than 2 consecutive days, We will reimburse for round trip economy-class transportation for one Individual selected by the Insured Person, from the Insured Person's current Home Country to the location where the Insured Person is hospitalized. We will also pay this benefit if the Insured Person was the victim of a Felonious Assault. "Felonious Assault" means a violent or criminal act reported to the local authorities which was directed at the Insured Person during the course of, or an attempt of, a physical assault resulting in serious Injury, kidnapping or rape. The benefits reimbursable will include:

- The cost of a round trip economy airfare and their hotel and meals up to the maximum stated in the *Schedule of Benefits*, Emergency Medical Reunion.

All travel arrangements must be made through ACIS.

Trip Delay Benefit

We will reimburse Covered Expenses up to the Daily Benefit per person per day subject to the Maximum Benefit Period and the Benefit Maximum shown in the *Schedule of Benefits*, if an Insured's trip is delayed for more than 12 hours.

Covered Expenses include charges incurred for reasonable, additional accommodations and traveling expenses until travel becomes possible. Incurred expenses must be accompanied by receipts. This benefit is payable only for one delay of the Insured's Trip. Travel Delay must be caused by one of the following reasons:

a) Injury, Sickness or death of the Insured Person; b) carrier delay; c) lost or stolen passport, travel documents or money; d) Quarantine; e) Natural Disaster; f) the Insured being delayed by a traffic accident while en route to a departure; g) hijacking; h) unpublished or unannounced strike; i) civil disorder or commotion; j) riot; k) inclement weather which prohibits Common Carrier departure; l) a Common Carrier strike or other job action; m) equipment failure of a Common Carrier; or n) the loss of the Insured's and/or traveling companion's travel documents, tickets or money due to theft.

"Quarantine" means the Insured is forced into medical isolation by a recognized government authority, their authorized deputies, or medical examiners due to the Insured either having, or being suspected of having, a contagious disease, infection or contamination while the Insured is traveling outside of their Home Country.

The Insured's Duties in the Event of Loss: The Insured must provide Us with proof of the Travel Delay such as a letter from the airline, cruise line, or Tour operator/ newspaper clipping/ weather report/ police report or the like and proof of the expenses claimed as a result of Trip Delay.

Trip Interruption Benefit

We will reimburse the cost of a one-way economy air and/or ground transportation ticket of the Insured Person's trip, if his or her trip is interrupted as the result of:

- the death of a Family Member; or
- the unforeseen injury or sickness of the covered person or a Family Member. The injury or sickness must be so disabling as to reasonably cause a trip to be interrupted.

You must provide Us with proof of the Trip Interruption such as a letter from a Doctor, medical notes, or death certificate (if applicable). The total benefits payable under the Trip Interruption Benefit will not exceed the maximum stated in the *Schedule of Benefits*.

Once the ACIS program has begun there is no provision for recovery of transportation, tuition, room and board or any fees.

Personal Property Benefit *(Ultimate/Ultimate-Plus Plans Only)*

We will reimburse the Insured Person the reasonable cost, up to the Benefit Maximum shown in the *Schedule of Benefits* after satisfaction of the Deductible, for replacement of any personal property that is lost or totally destroyed while the Insured Person is on his or her Trip. Replacement costs are calculated on the basis of the depreciated standard for the specific personal item claimed and its average usable period. The Insured Person must demonstrate that he or she has taken reasonable precautions for the safety and security of any covered property, and We require certification by a police or security authority in an incident report.

For any claim the Insured Person makes under this Benefit, We are entitled to make reasonable repairs or salvage efforts to restore his or her personal property or to keep the damaged property if We choose to do so. We will require valid receipts of replacement goods prior to payment of any benefits.

"Personal Property" means personal goods belonging to the Insured or for which the Insured is responsible and are taken on the Trip or acquired by the Insured during the Trip. It does not include vehicles (including aircraft and other conveyances) or their accessories or equipment or laptops.

Baggage Delay Benefit *(Ultimate/Ultimate-Plus Plans Only)*

If the Insured Person's checked-in luggage is not delivered to him or her within the Time Period shown in the *Schedule of Benefits* at the scheduled destination point of his or her flight, we will reimburse the Insured Person for charges incurred at the scheduled destination for purchases of essential clothing and toiletries up to the Benefit Maximum shown in the *Schedule of Benefits*. These purchases must be made within 24 hours of the Insured Person's arrival or prior to the return of the luggage, whichever is sooner.

The Insured Person must provide documentation of the delay or misdirection of baggage by the Common Carrier and receipts for the emergency purchases.

Exclusions and Limitations

For benefits listed under Accidental Death and Dismemberment, this insurance does not cover:

- Disease of any kind.
- Bacterial infections except pyogenic infections which occur from an accidental cut or wound.
- Neuroses, psychoneuroses, psychopathies, psychoses or mental or emotional diseases or disorders of any type.

- Intentionally self-inflicted injury; suicide or attempted suicide (Applicable to Accidental Death and Dismemberment benefits only).
- War or any act of war, whether declared or not.
- Injury sustained while riding as a pilot, student pilot, operator, or crew member, in or on, boarding or alighting from, any type of aircraft.
- Injury occasioned or occurring while committing or attempting to commit a felony.

In addition, We will not pay Medical Expense Benefits for any loss, treatment, or services resulting from, or contributed to by:

- Pre-Existing Conditions.
- Charges for treatment which is not Medically Necessary.
- Charges for treatment which exceed Reasonable and Customary charges.
- Charges incurred for surgery or treatments which are experimental/investigational, or for research purposes.
- Services, supplies or treatment, including any period of Hospital confinement, which were not recommended, approved and certified as Medically Necessary and reasonable by a Doctor.
- War or any act of war, whether declared or not
- Injury sustained while participating in professional athletics.
- Routine physicals, immunizations, or other examinations where there are no objective indications or impairment in normal health, and laboratory, diagnostic or x-ray examinations, except in the course of an Injury or Sickness established by a prior call or attendance of a Doctor.
- Treatment of the temporomandibular joint.
- Any treatment, service or supply not specifically covered by the Policy.
- Services or supplies performed or provided by a Relative of the Insured Person, or anyone who lives with the Insured Person.
- Cosmetic or plastic surgery, except as the result of a covered Injury.
- Elective Surgery or Elective Treatment which can be postponed until the Insured Person returns to his/her Home Country or Permanent Residence, where the objective of the trip is to seek medical advice, treatment or surgery.
- Treatment and the provision of false teeth or dentures, normal hearing tests and the provision of hearing aids.
- Eye refractions or eye examinations for the purpose of prescribing corrective lenses for eyeglasses or for the fitting thereof, unless caused by an Injury Incurred while insured hereunder.
- Treatment while confined primarily to receive custodial care, educational or rehabilitative care, or nursing services.
- Congenital abnormalities and conditions arising out of or resulting therefrom.
- Expenses as a result of or in connection with the commission of a felony offense.
- Injury sustained while taking part in mountaineering where ropes or guides are normally used; hang gliding; parachuting; bungee jumping; racing by horse, motor vehicle or motorcycle; parasailing.
- Treatment paid for or furnished under any mandatory government program or facility set up for treatment without cost to any individual.
- Injury or Sickness covered by Workers' Compensation, Employers' Liability laws, or similar occupational benefits
- Injuries for which benefits are payable under any no-fault automobile insurance policy.
- Routine dental treatment.
- Drugs, treatments or procedures that either promote or prevent conception, or prevent childbirth, including but not limited to: artificial insemination, treatment for infertility or impotency, sterilization or reversal thereof, or abortion.
- Treatment for human organ tissue transplants and related treatment.
- Weak, strained or flat feet, corns, calluses, or toenails.
- Diagnosis and treatment of acne.
- Injury sustained while the Insured Person is riding as a pilot, student pilot, operator or crew member, in or on, boarding or alighting from, any type of aircraft.
- Dental care, except as the result of Injury to natural teeth caused by a Covered Accident, unless otherwise covered under this Policy
- Expenses Incurred within the Insured Person's Home Country or country of Permanent Residence, unless otherwise covered under this Policy
- Mental or Nervous Disorders or rest cures, unless otherwise covered under this Policy.

In addition to the Policy Exclusions, We will not pay Baggage Benefit(s) for:

- loss or damage due to: a) moth, vermin, insects, or other animals; wear and tear; atmospheric or climatic conditions; or gradual deterioration or

- defective materials or craftsmanship; b) mechanical or electrical failure; c) any process of cleaning, restoring, repairing, or alteration.
- more than a reasonable proportion of the total value of the set where the loss or damaged article is part of a set or pair.
- devaluation of currency or shortages due to errors or omissions during monetary transactions.
- any loss not reported to either the police or transport carrier within 24 hours of discovery.
- any loss due to confiscation or detention by customs or any other authority.
- electronic equipment or devices including, but not limited to: cellular telephones; citizen band radios; tape players; radar detectors; radios and other sound reproducing or receiving equipment; PDAs; BlackBerrys; laptop computers; and handheld computers.

This insurance does not apply to the extent that trade or economic sanctions or other laws or regulations prohibit Us from providing insurance, including, but not limited to, the payment of claims.

Subrogation

To the extent the Company pays for a loss suffered by an Insured Person, the Company will take over the rights and remedies the Insured Person had relating to the loss to the extent permitted by law. This is known as subrogation. The Insured Person must help the Company to preserve its rights against those responsible for the loss. This may involve signing any papers and taking any other steps the Company may reasonably require. If the Company takes over an Insured Person's rights, the Insured Person must sign an appropriate subrogation form supplied by the Company.

Definitions

Company shall be Crum & Forster SPC

Covered Accident means an event, independent of Sickness or self-inflicted means, which is the direct cause of bodily Injury to an Insured Person.

Covered Expenses means expenses which are for Medically Necessary services, supplies, care, or treatment due to Sickness or Injury, prescribed, performed or ordered by a Doctor, and Reasonable and Customary charges incurred while insured under this Policy, and that do not exceed the maximum limits shown in the *Schedule of Benefits*, under each stated benefit.

Deductible means the amount of eligible Covered Expenses which are the responsibility of each Insured Person and must be paid by each Insured Person before benefits under the Policy are payable by Us. The Deductible amount is stated in the *Schedule of Benefits*, under each stated benefit.

Doctor as used in this Policy means a doctor of medicine or a doctor of osteopathy licensed to render medical services or perform surgery in accordance with the laws of the jurisdiction where such professional services are performed.

Effective Date means the date the Insured Person's coverage under the Policy begins. An Eligible Person will be insured on the latest of: 1) the Policy Effective Date; 2) the date he or she is eligible; or 3) the date requested by the Participating Organization provided the required premium is paid.

Elective Surgery or Elective Treatment means surgery or medical treatment which is not necessitated by a pathological or traumatic change in the function or structure in any part of the body first occurring after the Insured Person's effective date of coverage. Elective Surgery includes, but is not limited to, circumcision, tubal ligation, vasectomy, breast reduction, sexual reassignment surgery, and submucous resection and/or other surgical correction for deviated nasal septum, other than for necessary treatment of covered purulent sinusitis. Elective Surgery does not apply to cosmetic surgery required to correct Injuries suffered in a Covered Accident. Elective Treatment includes, but is not limited to, treatment for acne, nonmalignant warts and moles, weight reduction, infertility, and learning disabilities.

Eligible Benefits means benefits payable by Us to reimburse expenses that are for Medically Necessary services, supplies, care, or treatment due to Sickness or Injury, prescribed, performed or ordered by a Doctor, and Reasonable and Customary charges incurred while insured under this Policy; and which do not exceed the maximum limits shown in the *Schedule of Benefits* under each stated benefit.

Emergency means a medical condition manifesting itself by acute signs or symptoms which could reasonably result in placing the Insured Person's life or limb in danger if medical attention is not provided within 24 hours.

Family Member or Immediate Family Member means an Insured Person's spouse, domestic partner, child, brother, sister, parent, grandparent, or immediate in-law.

Home Country means the country where an Insured Person has his or her true, fixed and permanent home and principal establishment or the United States. Coverage under this Policy is extended to U.S. citizens traveling to U.S. Territories.

Hospital as used in this Policy means, except as may otherwise be provided, a Hospital (other than an institution for the aged, chronically ill or convalescent, resting or nursing homes) operated pursuant to law for the care and treatment of sick or Injured persons with organized facilities for diagnosis and surgery and having 24-hour nursing service and medical supervision.

Injury means accidental bodily harm sustained by an Insured Person that results directly and independently from all other causes from a Covered Accident. All injuries sustained by one person in any one accident, including all related conditions and recurrent symptoms of these injuries, are considered a single Injury.

Insured Person(s) means a person eligible for coverage under the Policy as defined in "Eligible Persons" who has applied for coverage and is named on the application if any and for whom We have accepted premium.

Medically Necessary or Medical Necessity means health care services that a Doctor, exercising prudent clinical judgment, would provide to a patient for the purpose of preventing, evaluating, diagnosing, or treating a sickness or an injury, or its symptoms, and that are: (a) in accordance with generally accepted standards of medical practice; (b) clinically appropriate, in terms of type, frequency, extent, site, and duration and considered effective for the patient's sickness or injury, and (c) not primarily for the convenience of the patient, physician, or other health care provider and not more costly than an alternative service or sequence of services at least as likely to produce equivalent therapeutic or diagnostic results as to the diagnosis or treatment of that patient's sickness or injury. "Generally accepted standards of medical practice" means standards that are based on credible scientific evidence published in peer-reviewed medical literature generally recognized by the relevant medical community or otherwise consistent with the standards set forth in policy issues involving clinical judgment.

Mental and Nervous Disorder means a Sickness that is a mental, emotional or behavioral disorder.

Permanent Residence or Country of Residence means the country where an Insured Person has his or her true, fixed and permanent home and principal establishment, and to which he or she has the intention of returning.

Pre-Existing Condition means an illness, disease, or other condition of the Insured Person within 180 days prior to the Insured Person's coverage became effective under the Policy: 1) first manifested itself, worsened, became acute, or exhibited symptoms that would have caused a person to seek diagnosis, care, or treatment; or 2) required taking prescribed drugs or medicines, unless the condition for which the prescribed drug or medicine is taken remains controlled without any change in the required prescription; or 3) was treated by a Doctor or treatment had been recommended by a Doctor.

Reasonable and Customary means the maximum amount that We determine is Reasonable and Customary for Covered Expenses the Insured Person receives, up to but not to exceed charges actually billed. Our determination considers: 1) amounts charged by other service providers for the same or similar service in the locality where received, considering the nature and severity of the bodily Injury or Sickness in connection with which such services and supplies are received; 2) any usual medical circumstances requiring additional time, skill or experience; and 3) other factors We determine are relevant, including but not limited to, a resource based relative value scale.

Relative means spouse, Domestic Partner, parent, sibling, child, grandparent, grandchild, step-parent, step-child, step-sibling, in-laws (parent, son, daughter, brother and sister), aunt, uncle, niece, nephew, legal guardian, ward, or cousin of the Insured Person.

Sickness wherever used in this Policy means illness or disease of any kind contracted and commencing after the Effective Date of this Policy and covered by this Policy.

Termination of Insurance means the Insured Person's coverage will end on the earliest of the following date: 1) the Policy terminates; 2) the Insured Person is no longer eligible; 3) of the last day of the Term of Coverage, requested by the Participating Organization, applicable to the Insured Person; or 4) the period ends for which premium is paid. Termination of the Policy will

not affect Trip coverage, if premium for the Trip is paid prior to the actual start of the Trip.

U.S. Territories means lands that are directly overseen by the United States Federal Government. A list of these territories would include the United States Virgin Islands, Guam, American Samoa, Northern Mariana Islands, and Puerto Rico.

We, Our, Us means the insurance company underwriting this Insurance.

Team Assist Plan (TAP) – On Call International

(non-insurance services)

The Team Assist Plan is designed by CISI in conjunction with the Assistance Company to provide travelers with a worldwide, 24-hour emergency telephone assistance service. Multilingual help and advice may be furnished for the Insured Person in the event of any emergency during the term of coverage. The Team Assist Plan complements the insurance benefits provided by the Medical Plan. The Team Assist Plan provides the non-insurance services, and Crum & Forster SPC pays expenses up to the amount shown in the *Schedule of Benefits* for:

- Emergency Medical Evacuation
- Return of Mortal Remains
- Security Evacuation

All services must be arranged through the Assistance Provider.

Emergency Medical Evacuation Benefit

The Company shall pay benefits for Covered Expenses Incurred up to the maximum stated in the *Schedule of Benefits*, if any Injury or Covered Sickness commencing during the Period of Coverage results in the Medically Necessary Emergency Medical Evacuation of the Insured Person. The decision for an Emergency Medical Evacuation must be ordered by the Assistance Company in consultation with the Insured Person's local attending Doctor.

Emergency Medical Evacuation means: a) the Insured Person's medical condition warrants immediate transportation from the place where the Insured Person is located (due to inadequate medical facilities) to the nearest adequate medical facility where medical treatment can be obtained; or b) after being treated at a local medical facility, the Insured Person's medical condition warrants transportation with a qualified medical attendant to his/her Home Country or Permanent Residence to obtain further medical treatment or to recover; or c) both a) and b) above.

Covered Expenses are expenses, up to the maximum stated in the *Schedule of Benefits*, Emergency Medical Evacuation, for transportation, medical services and medical supplies necessarily incurred in connection with Emergency Medical Evacuation of the Insured Person. All transportation arrangements must be by the most direct and economical route.

Repatriation/Return of Mortal Remains or Cremation Benefit

The Company will pay the reasonable Covered Expenses incurred up to the maximum as stated in the *Schedule of Benefits*, Repatriation/Return of Mortal Remains, to return the Insured Person's remains to his/her then current Home Country or Permanent Residence, if he or she dies. Covered Expenses include, but are not limited to, expenses for embalming, cremation, a minimally necessary container appropriate for transportation, shipping costs and the necessary government authorizations, and Escort Services: expenses for an Immediate Family Member or companion who is traveling with the Insured Person to join the Insured Person's body during the repatriation to the Insured Person's place of residence..

Note: All Covered Expenses in connection with either **Emergency Medical Evacuation** or **Return of Mortal Remains** must be pre-approved and authorized by an Assistance Company representative appointed by the Company.

The TAP offers these services:

(These services are not insured benefits)

Medical Assistance

Medical Referral Referrals will be provided for doctors, hospitals, clinics or any other medical service provider requested by the Insured. Service is available 24 hours a day, worldwide.

Medical Monitoring In the event the Insured is admitted to a foreign hospital, the AP will coordinate communication between the Insured's own doctor and the attending medical doctor or doctors. The AP will monitor the Insured's progress and update the family or the insurance company accordingly.

Prescription Drug Replacement/Shipment Assistance will be provided in replacing lost, misplaced, or forgotten medication by locating a supplier of the same medication or by arranging for shipment of the medication as soon as possible.

Emergency Message Transmittal The AP will forward an emergency message to and from a family member, friend or medical provider.

Coverage Verification/Payment Assistance for Medical Expenses The AP will provide verification of the Insured's medical insurance coverage when necessary to gain admittance to foreign hospitals, and if requested, and approved by the Insured's insurance company, or with adequate credit guarantees as determined by the Insured, provide a guarantee of payment to the treating facility.

Travel Assistance

Obtaining Emergency Cash The AP will advise how to obtain or to send emergency funds world-wide.

Traveler Check Replacement Assistance The AP will assist in obtaining replacements for lost or stolen traveler checks from any company, i.e., Visa, Master Card, Cooks, American Express, etc., worldwide.

Lost/Delayed Luggage Tracing The AP will assist the Insured whose baggage is lost, stolen or delayed while traveling on a common carrier. The AP will advise the Insured of the proper reporting procedures and will help travelers maintain contact with the appropriate companies or authorities to help resolve the problem.

Replacement of Lost or Stolen Airline Ticket One telephone call to the provided 800 number will activate the AP's staff in obtaining a replacement ticket.

Technical Assistance

Credit Card/Passport/Important Document Replacement The AP will assist in the replacement of any lost or stolen important document such as a credit card, passport, visa, medical record, etc. and have the documents delivered or picked up at the nearest embassy or consulate.

Locating Legal Services The AP will help the Insured contact a local attorney or the appropriate consular officer when an Insured is arrested or detained, is in an automobile accident, or otherwise needs legal help. The AP will maintain communications with the Insured, family, and business associates until legal counsel has been retained by or for the Insured.

Assistance in Posting Bond/Bail The AP will arrange for the bail bondsman to contact the Insured or to visit at the jail if incarcerated.

Worldwide Inoculation Information Information will be provided if requested by an Insured for all required inoculations relative to the area of the world being visited as well as any other pertinent medical information.

Security Evacuation (Comprehensive)

Coverage (up to the amount shown in the *Schedule of Benefits*, Security Evacuation) is provided for security evacuations for specific Occurrences. To view the covered Occurrences and to download a detailed PDF of this brochure, please go to the following web page:

http://www.culturalinsurance.com/cisi_forms.asp.

DISCLOSURES

Note: This insurance is not subject to and does not provide certain insurance benefits required by the United States' Patient Protection and Affordable Care Act ("PPACA"). PPACA requires certain US citizens or US residents to obtain PPACA compliant health insurance, or "minimum essential coverage." PPACA also requires certain employers to offer PPACA compliant insurance coverage to their employees. Tax penalties may be imposed on U.S. residents or citizens who do not maintain minimum essential coverage, and on certain employers who do not offer PPACA compliant insurance coverage to their employees. In some cases, certain individuals may be deemed to have minimum essential coverage under PPACA even if their insurance coverage does not provide all of the benefits required by PPACA. You should consult your attorney or tax professional to determine whether the policy meets any obligations you may have under PPACA.

Privacy Statement: We know that your privacy is important to you and we strive to protect the confidentiality of your non-public personal information. We do not disclose any non-public personal information about our Insureds or former insureds to anyone, except as permitted or required by law. We maintain appropriate physical, electronic and procedural safeguards to ensure the security of your non-public personal information. You may obtain a detailed copy of our privacy policy by calling us 1-800-303-8120 or by visiting us at https://www.culturalinsurance.com/cisi_privacy.asp.

Complaints: In the event that you remain dissatisfied and wish to make a complaint you can do so to the Complaints team https://www.culturalinsurance.com/cisi_privacy.asp#CONTACT.

Data Protection: Please note that sensitive health and other information that you provide may be used by us, our representatives, the insurers and industry governing bodies and regulators to process your insurance, handle claims and prevent fraud. This may involve transferring information to other countries (some of which may have limited, or no data protection laws). We have taken steps to ensure your information is held securely. Where sensitive personal information relates to anyone other than you, you must obtain the explicit consent of the person to whom the information relates both to the disclosure of such information to us and its use as set out above. Information we hold will not be shared with third parties for marketing purposes. You have the right to access your personal records.

By purchasing this insurance provided by Crum & Forster SPC, you become a member of the ITA Global Trust, LTD.

Cultural Insurance Services International (CISI)

1 High Ridge Park | Stamford, CT 06905

Phone: 203-399-5130 | Fax: 203-399-5596

claimhelp@mycisi.com • www.culturalinsurance.com



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Memorandum

TO: Marblehead School Committee
FROM: Julia Ferreira
DATE: March 20, 2024
RE: Student Opportunities Act Plan

Attached is the final draft of the Marblehead Public Schools Student Opportunities Act Plan (2024-2027) for your consideration and vote at the March 21, 2024 School Committee meeting. Thank you.

Suggested motion:

Motion to approve the Marblehead Public Schools Student Opportunities Act Plan for 2024-2027.



Marblehead Public Schools

Student Opportunities Act Plan

Julia Ferreira, Assistant Superintendent of Teaching & Learning

March 21, 2024

School Committee Meeting

Student Opportunities Act Plan - Overview



- The Student Opportunity Act (SOA) was enacted in 2019 with a focus on providing funding to districts serving students with the greatest needs. The law also requires every district to set clear targets for improving disparities in achievement among student groups and develop a three-year plan to implement evidence-based strategies to meet their targets.
- Two key plans that districts produce on a regular basis are: 1) District Plan for Success and 2) SOA plans. The District's Plan For Success describes the *full set of strategies* that a district will implement to support *all students* in their district. By contrast, the SOA Plan addresses a *subset* of a district's overall initiatives, focusing on evidence-based programs and strategies that will improve the educational experiences and outcomes of targeted subgroups. Our District's SOA plan spotlights evidence-based programs and strategies that are focused on rapidly improving outcomes for students with disabilities and English learners.

Student Opportunity Act Plan - Overview



1. Summarize Your District Plan
2. Analyze Your Data and Select Student Groups for Focused Support
3. Set Ambitious Three-Year Targets for Improving Student Achievement
4. Engage Families/Caregivers and other Stakeholders
5. Select Evidence-Based Programs and Strategies to Address Disparities in Achievement

- April 2024:** Districts will submit a new three-year SOA plan
- Spring 2025:** Districts will submit a progress update
- Spring 2026:** Districts will submit a progress update
- April 2027:** Districts will submit a new three-year SOA plan

Student Opportunity Act Plan



For the next three years, MPS will focus on increasing academic achievement of all students, including our English Learners and students with disabilities, while supporting their social-emotional well-being by:

1) Implementing a multi-tiered system of support (MTSS) that helps all students progress both academically and in their social, emotional, and behavioral development.

- *MPS will provide a comprehensive set of Tier 1 social-emotional learning (SEL) and academic supports as part of the MTSS framework for grades K-12.*

2) Selecting and skillfully implementing high-quality and engaging instructional materials that support culturally and linguistically sustaining practices and foster deeper learning.

- *MPS will engage teachers in professional development linked directly to the curriculum and establish a process to regularly monitor the effectiveness of curriculum implementation.*
- *MPS will administer a reliable early literacy screening assessment in grades K-3 and provide interventions to meet students' learning needs.*

Student Opportunity Act Plan - MCAS Data Analysis



District Results by Year - ELA: % Proficient
(All Students)

District Name	2017	2018	2019	2021	2022	2023
Andover	64%	68%	71%	65%	65%	67%
Beverly	52%	56%	57%	50%	44%	46%
Lexington	79%	80%	79%	75%	75%	76%
Lynnfield	73%	71%	77%	70%	59%	62%
Marblehead	64%	69%	65%	64%	55%	60%
Swampscott	60%	65%	62%	57%	48%	47%
Wellesley	76%	79%	79%	75%	72%	76%
Weston	75%	81%	83%	76%	74%	75%
Winchester	77%	79%	81%	73%	69%	69%

Click [here](#) to view a deeper dive of MPS MCAS data analysis by grade cohort for students with disabilities and English Learners.

District Results by Year - Math: % Proficient
(All Students)

District Name	2017	2018	2019	2021	2022	2023
Andover	61%	64%	67%	57%	64%	65%
Beverly	50%	51%	52%	36%	42%	45%
Lexington	81%	81%	82%	72%	78%	79%
Lynnfield	75%	76%	77%	58%	65%	64%
Marblehead	62%	64%	63%	56%	50%	59%
Swampscott	58%	56%	55%	41%	43%	46%
Wellesley	71%	75%	75%	62%	71%	77%
Weston	78%	77%	81%	69%	75%	74%
Winchester	80%	80%	79%	61%	68%	70%

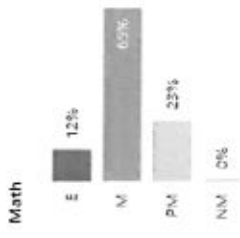
Student Opportunity Act Plan - District-wide Data Analysis



Math

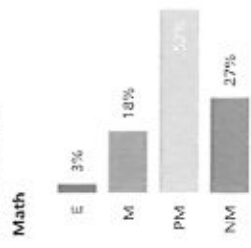
Not including
Special Ed. & English
Learners

MCAS - 2023



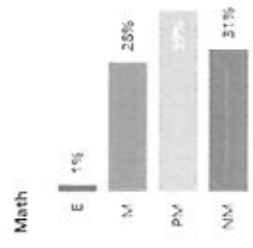
Special Ed.

MCAS - 2023



English Learners

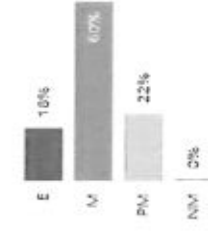
MCAS - 2023



ELA

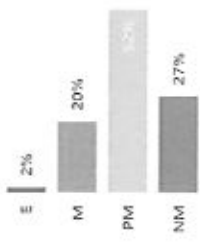
Not including
Special Ed. & English
Learners

MCAS - 2023



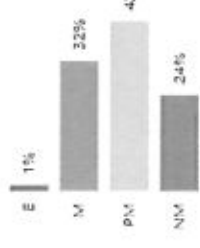
Special Ed.

MCAS - 2023



English Learners

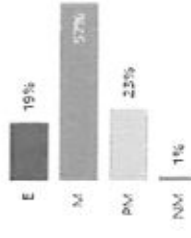
MCAS - 2023



Science

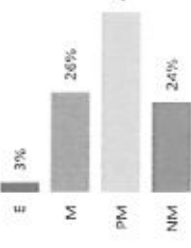
Not including
Special Ed. & English
Learners

MCAS - 2023



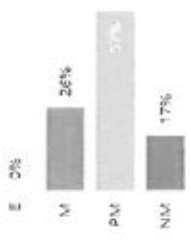
Special Ed.

MCAS - 2023



English Learners

MCAS - 2023

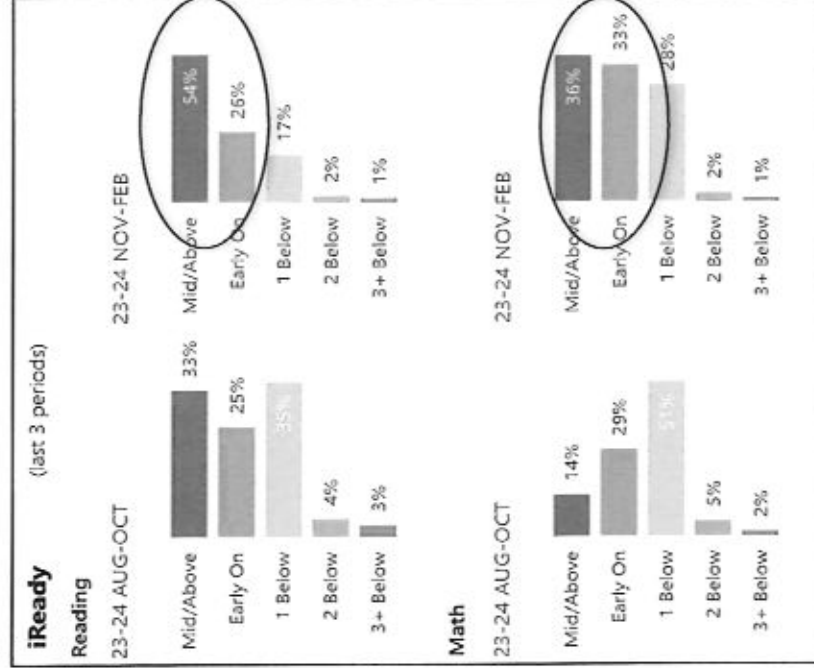


Data Websites:
 - [DESE Student Outcome Comparison Tool](#)
 - [DESE Accountability report card](#)

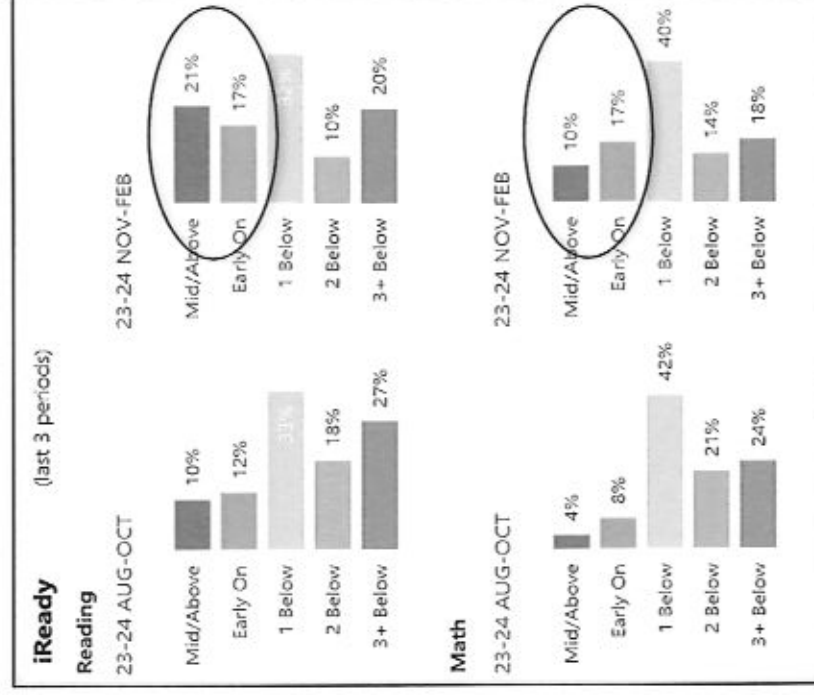
iReady Data - Deeper Dive



General Education



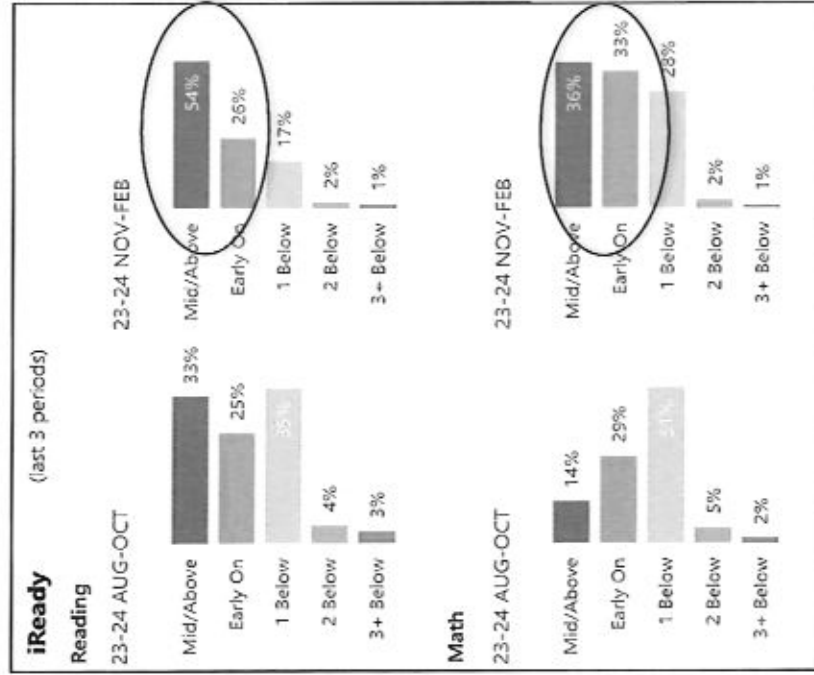
Special Education



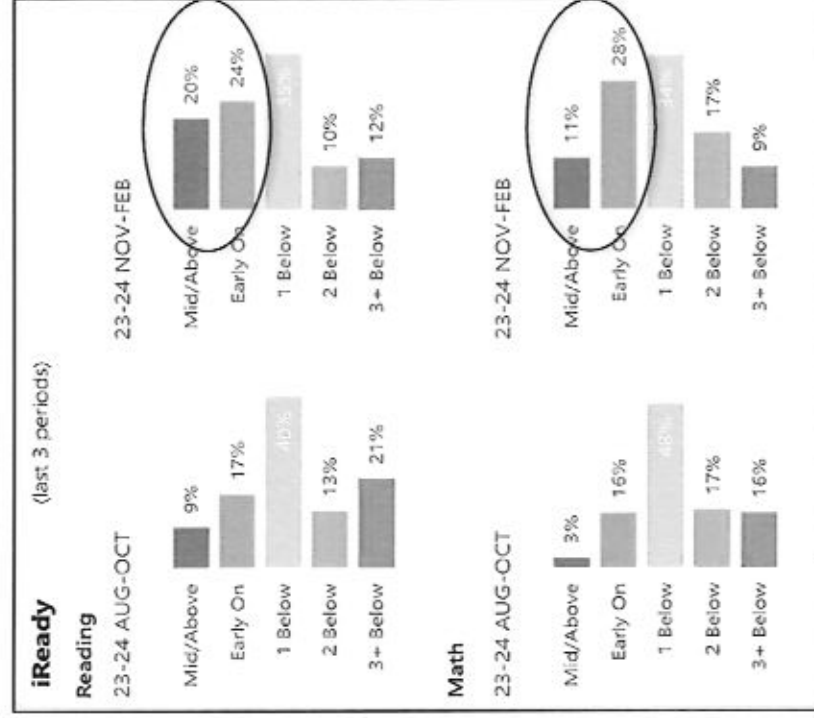
iReady Data - Deeper Dive



General Education



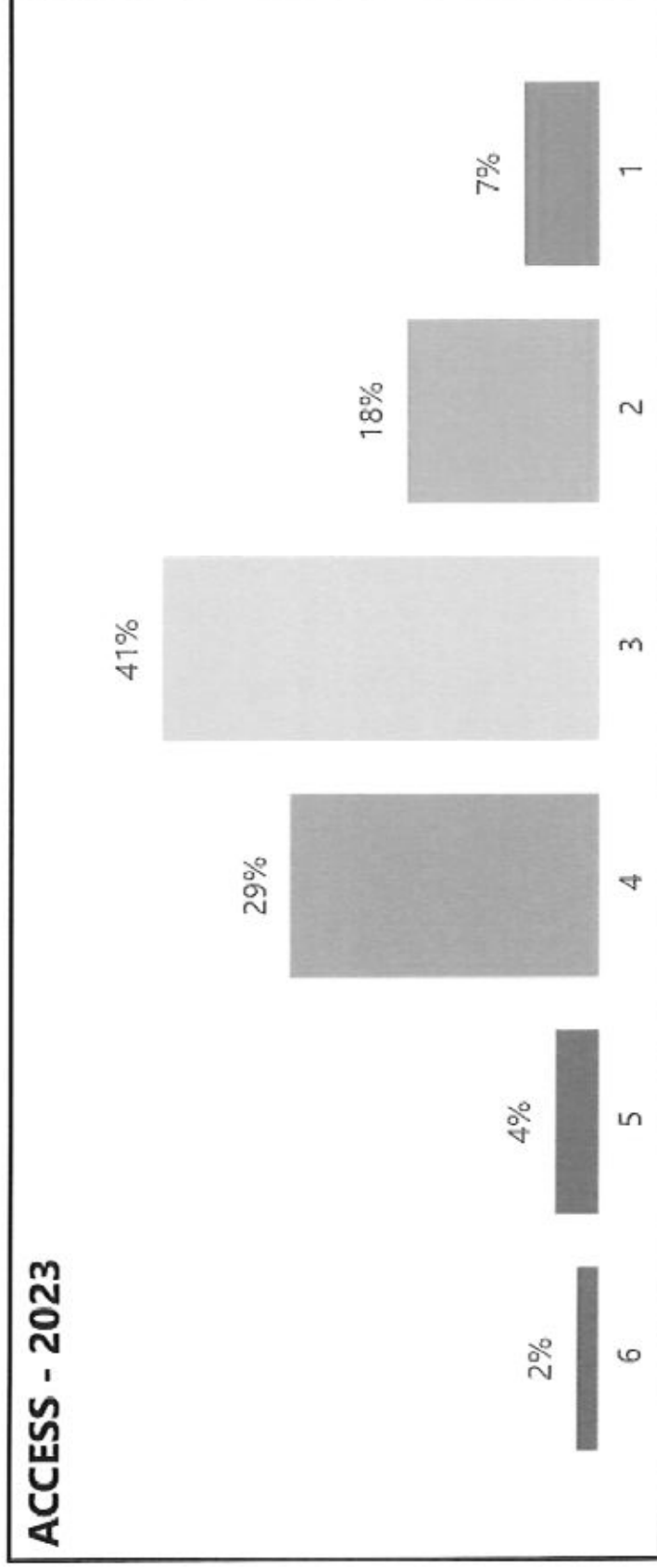
English Learners





ACCESS Test Results

How are our English Language Learners progressing with their English language acquisition?



ACCESS Test Results

How are our English Language Learners progressing with their English language acquisition?



Change in Level Since Previous Year

For students who took test previous year and selected year

↑ 59

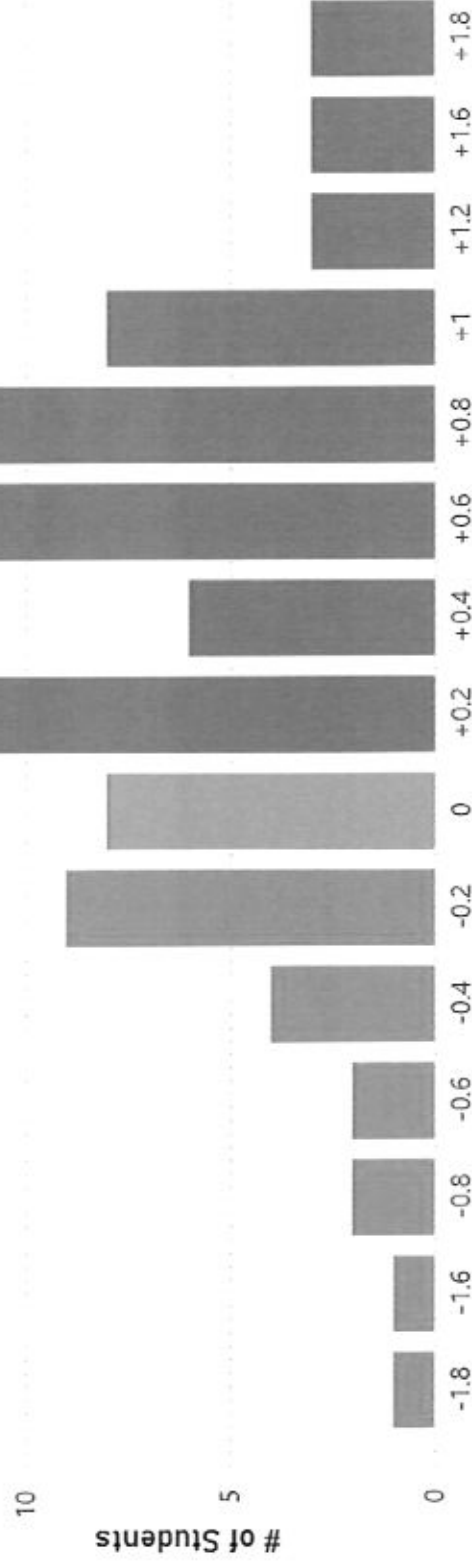
Students Increased Level

8

Students Stayed the Same Level

↓ 19

Students Dropped in Level



**Marblehead Public Schools
Student Opportunities Act Plan
2024-2027**

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Section 1: Summarize your District's Plan

- Write a brief executive summary of your three-year SOA plan. While this section is presented at the beginning of your plan, we recommend writing it after you have completed the other sections of your plan.

Submission Questions

- Please write 1-2 paragraphs summarizing your 3-year SOA plan. Make sure the summary:
 - Identifies the student groups you are targeting for accelerated improvement.
 - Describes the selected Evidence-Based Programs your district will use to address the disparities in learning experiences and outcomes for these student groups.
 - Explains at a high level the investments you plan to make and what will change in your district because of this plan.

The Marblehead Public School (MPS) District is committed to serving all students and ensuring an equitable learning environment for all students. Our goal is to fully align teaching & learning, PreK-12, with our multi-tiered system of support (MTSS) framework to ensure all students meet or exceed academic & social-emotional learning expectations. MPS educators use evidence-based programs to address disparities in performance between student groups in our district, and accelerate the improvement of all of our students. Our MTSS model provides an essential framework that focuses on system-level change across our classrooms, schools, and District to meet all students' academic, social-emotional, and behavioral needs, including students with disabilities and English Learners (ELs). Our school improvement plans for each school includes goals to work to effectively integrate MTSS to support all learners. Furthermore, teachers, instructional coaches, and building principals participate in Professional Learning Community meetings to examine data, monitor student learning, and plan for aligned instructional delivery. Data sources the administration team and faculty use to examine students' progress and inform instruction and intervention includes: iReady Diagnostic, iReady Literacy Tasks, WIST (word identification and spelling test), MCAS, ACCESS, and common assessments. The implementation of aligned, high-quality math and English Language Arts (literacy) curriculum in the last few years has been a major step forward for our District to ensure equitable access to core instruction.

For the next three years, MPS will focus on increasing academic achievement of all students, including our **English Learners and students with disabilities**, while supporting their social-emotional well-being by:

- 1) **Implementing a multi-tiered system of support (MTSS) that helps all students progress both academically and in their social, emotional, and behavioral development.** *MPS will provide a comprehensive set of Tier 1 social-emotional learning (SEL) and academic support as part of the MTSS framework for grades K-12. Disparities in ELA and math MCAS performance among English learners and students with disabilities can be reduced with a comprehensive set of tiered supports for all learners across all three domains - academic, social/emotional, and behavioral - that are culturally sustaining and universally designed to address students' needs.*
- 2) **Selecting and skillfully implementing high-quality and engaging instructional materials that support culturally and linguistically sustaining practices and foster deeper learning.** *MPS will engage teachers in professional development linked directly to the curriculum and establish a process to regularly monitor the effectiveness of curriculum*

implementation. For example, we support multilingual learners by aligning the newly adopted Wit & Wisdom literacy curriculum (grades K-6) to accelerate language development and increase the percentage of English learners in grades K-8 making progress on the ACCESS. Additionally, MPS will administer a reliable early literacy screening assessment in grades K-3 and provide interventions to meet students' learning needs. Disparities in performance between student groups are apparent as early as Kindergarten, and are particularly apparent in reading, emphasizing the need for early literacy interventions, as evidenced by percentage of ELs below grade level on iReady diagnostic assessments.

Section 2: Analyze Your Data and Select Student Groups for Focused Support

In this section, you will:

- Analyze district data to identify significant disparities in learning experiences and outcomes among student groups using the [Student Outcomes Comparison tool](#) or other summary data sources. After conducting an initial analysis to identify disparities, use additional sources of data, including other state and local outcomes data; instructional data; student, family, and community perspectives data; and systems-level data, to go deeper in your analysis and uncover why these disparities exist.
- Select student groups who will receive focused support within your SOA plan, as a result of your data analysis findings.

MPS is a coastal, suburban district on the North Shore in the Commonwealth that serves 2770 students. Our student population is 83% white, 8.4% Latino, 2.6% African American/Black, and 1.3% Asian. In addition, 31.8% of our students are in the "high needs" subgroup, which is comprised of students who belong to one or more of the following student groups: students with disabilities, English learners (ELs) and former ELs, and students from low income families.

In addition to our local data sources, MPS uses the "Student Learning Experience Report" and "Student Outcome Comparison Tool" as data points to explore and examine the potential causes of equity gaps and what they mean for student learning outcomes. After reviewing both internal and external data sources, we identified our **students with disabilities** and **English Learners** as the two groups of students with significant disparities in learning outcomes.

According to [DESE](#), students in the "high needs" subgroup are making "Moderate progress toward targets." When diving deeper into the data, disparities in learning outcomes are evident among students in this subgroup. Our students with disabilities have demonstrated disparities in MCAS performance as evidenced by a 23 point lower scale score on the ELA MCAS and a 21 point lower scale score on Math MCAS as compared to their general education peers' scale scores. Our ELs also have disparities in MCAS performance with their scale score reflecting a 25 point lower scale score in ELA and 24 point lower scale score in Math as compared to their native English speakers peers.

The disparity exists in the learning outcomes for students in the "high needs" subgroups, specifically students with disabilities because students in these subgroups have a disability that affects their learning experience, possibly from their youngest years as a learner, and English Learners, who are working to meet the fluency level of native English speakers. As envisioned by DESE, we will continuously work to ensure all MPS students, including our students in the "high needs" subgroup, are taught by effective, well-prepared, and culturally responsive educators who hold them to high standards and have the materials and professional learning they need to advance students' academic and linguistic development simultaneously.

For the next three years, **MPS will focus on increasing academic achievement of our English Learners and students with disabilities, while supporting their social-emotional well-being** by implementing targeted professional development to strengthen tier 1 instruction, expand on tier 2 and 3 academic and social-emotional supports. Currently, we do not have a social-emotional universal screener, so we will implement one, starting in grades K-6, to support students as part of our MTSS framework and provide educators with data on how students are developing their social-emotional learning skills. MPS seeks to increase targeted professional development to support educators' capacity to teach students with disabilities and multilingual learners. Finally, literacy support in grades K-3 helps strengthen literacy and foundational reading skills for our youngest learners. We will expand the intensive summer literacy program to use Foundations (evidence-based phonics program) and math intervention programs. We will collect pre and post data, with a focus on ensuring access to ELs and students with disabilities.

In summary, our deeper analysis has revealed two critical areas requiring attention:

- 1) Implementing a multi-tiered system of support (MTSS) that helps all students progress both academically and in their social, emotional, and behavioral development.
- 2) Selecting and skillfully implementing high-quality and engaging instructional materials that support culturally and linguistically sustaining practices and foster deeper learning.

Submission Questions

In conducting your data analysis, where did you observe the most significant disparities in student learning experiences and outcomes? On which measures and for which student groups? *open response*

MPS identified students with disabilities and ELs as demonstrating the most significant disparities in assessment data. When examining the data, there is a gap between the percentage of students with disabilities and ELs meeting or exceeding on Math, ELA, and Science MCAS and their native speaking general education peers. Additionally, our iReady diagnostic assessment data (grades K-8) indicates a deficit gap in reading and math achievement for students with disabilities and ELs when compared to their native English speaking general education peers.

What does your deeper analysis (including the triangulation of multiple types of data) suggest are the best ways to address these disparities across student groups? *open response*

The best way to address these disparities identified in our data sources is by enhancing our comprehensive tiered supports, increasing MTSS professional development for educators, and targeting Academic Support and Acceleration for students with disabilities and ELs.

Based on your identification of the greatest disparities in outcomes, which student groups will require focused support for rapid improvement as you implement your evidence-based programs over the next three years? *checkbox*

Students with disabilities and ELs

Section 3: Set Ambitious Three-Year Targets for Improving Student Achievement

In this section, you will:

- Commit to adopting the three-year improvement target established by DESE with the option to develop additional three-year accelerated improvement targets. DESE has established a three-year improvement target for each district to include in their SOA plans that focuses on rapidly improving the performance of the “Lowest Performing Students” group. This group, by definition, includes the students who currently have the lowest academic performance, and therefore need the most significant levels of support to reduce the disparities between their performance and that of their peers.
- DESE has chosen to use MCAS ELA and Math for the lowest performing student group to track progress in gap-closing.
 - Why this group? *By definition, this group includes the students who currently have the lowest academic performance, and therefore need the most significant levels of support to reduce the disparities between their performance and that of their peers. This group typically includes substantial proportions of a districts’ high needs population, as well as other student groups.*
- This target will provide one streamlined measure to show districts’ progress in improving performance across several priority student groups at the same time and will be tracked each year as part of districts’ annual SOA progress updates. However, districts focusing on improving performance for a single student group may set an additional target for that student group aligned to DESE’s accountability targets.

MPS will use the District's MTSS framework to enhance academic supports and interventions that provide all students, particularly students with disabilities and multilingual learners, equitable access to deeper learning. Each year, MPS examines our MCAS ELA and Math data to identify the lowest performing student group and track progress in gap-closing among students in the lowest performing subgroups. Our focus for the next three years is to improve academic achievement of our students in our "high needs" group. As we actively employ strategies outlined in this plan, we will measure progress through iReady diagnostic assessments three times a year and the culminating MCAS results.

We will integrate professional learning opportunities for teachers with a focus on grades K-6 for professional development focused on supporting literacy and math fluency for students with disabilities and multilingual learners.

To prevent summer learning loss, MPS will host an intensive Summer Literacy and Math program as a targeted academic support program for our elementary students in Kindergarten through grade 3 who are demonstrating gaps in understanding. Through this initiative, fifty students will receive evidence-based reading and math instruction. This program, designed to close achievement gaps for students by providing intensive literacy and math instruction to students identified with decoding and fluency deficits. By utilizing evidence-based methodologies and interventions, the ultimate goal of this program is to provide intensive, targeted interventions to close achievement gaps for students early in their academic careers.

Key Initiatives:

1) Implementing a multi-tiered system of support (MTSS) that helps all students progress both academically and in their social, emotional, and behavioral development. *MPS will provide a comprehensive set of Tier 1 social-emotional learning (SEL) and academic support as part of the MTSS framework for grades K-12. Disparities in ELA and math MCAS performance among English learners and students with disabilities can be reduced with a comprehensive set of tiered supports for all learners across all three domains - academic, social/emotional, and behavioral - that are culturally sustaining and universally designed to address students' needs.*

2) Selecting and skillfully implementing high-quality and engaging instructional materials that support culturally and linguistically sustaining practices and foster deeper learning. *MPS will engage teachers in professional development linked directly to the curriculum and establish a process to regularly monitor the effectiveness of curriculum implementation. For example, we support multilingual learners by aligning the newly adopted Wit & Wisdom literacy curriculum (grades K-6) to accelerate language development and increase the percentage of English learners in grades K-8 making progress on the ACCESS. Additionally, MPS will administer a reliable early literacy screening assessment in grade K-3 and provide interventions to meet students' learning needs. Disparities in performance between student groups are apparent as early as Kindergarten, and are particularly apparent in reading, emphasizing the need for early literacy interventions, as evidenced by percentage of ELs below grade level on iReady diagnostic assessments.*

In summary, MPS is committed to the following acceleration targets:

- Increase MCAS ELA and Math average composite scaled score for ELs and students with disabilities to meet achievement targets set by DESE each year.

Below is a chart of the 2024 achievement targets for MPS set by DESE:

	ELA Non-high school	ELA high school	Math Non-high school	Math high school	Science Non-high school	Science high school
EL and former EL	492.1	(fewer than 20 students tested - no target set by DESE)	492.7	(fewer than 20 students tested - no target set by DESE)	494.7	(fewer than 20 students tested - no target set by DESE)
Students with a Disability	485.2	492	485.9	494.4	488.5	494.5

Submission Questions

<p>Please confirm that your district will use DESE's three-year targets for increasing performance for the "Lowest Performing Students" group in ELA and math. checkbox - yes</p>
<p>If applicable, propose additional three-year targets for addressing persistent disparities in achievement for one or more student groups by subject matter and grade level. open response - N/A</p>
<p>Section 4: Engage Families/Caregivers and other Stakeholders</p>
<p>In this section, you will:</p> <ul style="list-style-type: none"> • Describe your district's ongoing efforts to engage families/caregivers, particularly those representing the student groups you have identified for targeted support, about how to best address their students' needs. • Describe the ways in which your district has engaged families/caregivers and other stakeholder groups in the development of your SOA plan. • Confirm your district has engaged with specific stakeholders in developing the plan as required by law.
<p>Marblehead Public Schools engages in on-going efforts to seek family and other stakeholder participation. An area of focus is our English Language Education (ELE) program, specifically with our English Language Parents Advisory Council. We recently shifted the ELE program to our Office of Teaching and Learning to enhance the connection between students, teachers, curriculum, professional development, and family engagement. We anticipate a more robust English Learners Parent Advisory Council (ELPAC) with this shift. Additionally, we have an engaged Special Education Parent Advisory Council (SEPAC) which meets regularly and collaborates with District leaders in efforts to continuously improve our special education program.</p>
<p>Submission Questions</p>
<p>Describe the approaches your district uses to regularly engage with families/caregivers. In your response, please be sure to address what steps you will be taking to meaningfully engage with families/caregivers of student groups you are targeting for accelerated improvement as this plan is implemented. open response</p>
<p>Each of our five schools has an active and engaged School Advisory Council made up of parents, staff, community members, and administration. The SAC advises the building principal with the development of school improvement plans and examines relevant school data to help inform their recommendations. Additionally, newsletters are regularly sent to families from teachers, school leaders, and central office administrators. We do seek to increase the frequency of ELPAC meetings and our membership at ELPAC meetings. We will also work with our ELPAC and SEPAC groups to get principals and staff to participate in those scheduled meetings.</p>
<p>How do you plan to measure increased family engagement with parents/caregivers of students in targeted groups in your district over the next three years? open response</p>
<p>We will use a tiered approach to increase family engagement with parents/caregivers of students in targeted groups. Our Tier 1 approach, for all families, will include instituting a survey to identify the best format for parents to meet and communicate with (Talking Points online translation, etc.) to increase family engagement. Our Tier 2 approach will be to utilize our SEPAC & ELPAC meetings to give presentations about MTSS at parent meetings, as a result of feedback received from parents during the development of our SOA plan. For our Tier 3, we will schedule individual parent meetings, as needed, to ensure we are continuously making an effort to engage our families.</p>
<p>Describe the ways in which you engaged different stakeholder groups in the development of your three-year SOA Plan. How have you integrated the perspectives of those groups into the three-year plan? How will you continue to engage stakeholders throughout the implementation of your plan? open response</p>
<p>We engaged different stakeholder groups in the development of our three-year SOA Plan. MPS school administrators and district leaders helped support the development of this SOA Plan. A draft of this SOA Plan was shared with faculty,</p>

parents, School Advisory Council members, Parent Council Leaders, ELPAC, and SEPAC. These stakeholders provided input on this SOA Plan via a survey and perspectives of the groups were integrated into this plan. Additionally, the MPS School Committee will review the SOA Plan on March 21, 2024. We will regularly share relevant data and information at forthcoming School Committee meetings to keep our school community informed of our implementation of this plan.

Confirm you engaged with the following stakeholder groups in the development of this plan: parents/caregivers, special education and English learner parent advisory councils, school improvement councils, and educators in the school district. *checkbox*

Confirm that your school committee voted to approve this plan and provide the date of the vote. *checkbox and date*
March 21, 2024

Section 5: Select Evidence Based Programs to Address Disparities in Outcomes

In this section, you will:

- Review the [Strategic Objectives](#) table on pages 9-12 of this document.
- Select one to three Focus Areas your district will prioritize to improve student learning experiences and outcomes for student groups identified in your data analysis.
- For each Focus Area, select one or more Evidence-Based Programs (EBPs) from the DESE-provided EBPs list.
- Answer additional questions about each EBP you select, including questions about resource allocation. For each Focus Area as a whole, select metrics you will use to monitor implementation progress using the suggested metrics in this document (these metrics will serve as leading indicators; districts will also measure progress each year through the lowest-performing student group target).

Example: Select the Focus Area that your district will prioritize over the next three years to address the academic disparities identified in your data analysis.

2.1 Select and skillfully implement high-quality and engaging instructional materials that support culturally and linguistically sustaining practices and foster deeper learning

Example: Which EBPs will your district implement within this Focus Area?

2.1C Comprehensive Approach to Early Literacy

Provide a short description of what your district has in place now related to this EBP and what you anticipate will be in place by the conclusion of the plan's implementation (by June 2027). *open response*

- Include details such as the specific programs that will be in place, staff that will be hired, and/or PD that will be offered.
- Explain how this EBP will improve learning experiences and outcomes for the student groups identified in Section 1. This could include how support for these groups may differ from district-wide implementation efforts.

1) Focus Area 1.2: Implement a multi-tiered system of support (MTSS) that helps all students progress both academically and in their social, emotional, and behavioral development.

Evidenced Based Programs:

- **1.2B Comprehensive Tiered Supports:** Provide a comprehensive set of tiered supports for all learners across all three domains - academic, social/emotional, and behavioral - that are culturally sustaining and universally designed.

Marblehead Public Schools (MPS) will work to enhance their current MTSS framework by increasing implementation of Tier 1 SEL curriculum (Responsive Classroom and Second Step) and adding a universal SEL screener grades K-6 (the Devereux Student Strengths Assessment, DESSA). MPS will also examine the academic interventions offered to students as part of the MTSS framework for grades K-12, which includes targeted academic support. Disparities in ELA and math MCAS performance among English learners and students with disabilities can be reduced with a comprehensive set of tiered supports for all learners across all three domains - academic, social/emotional, and behavioral - that are culturally sustaining and universally designed to address students' needs.

2) Focus Area 2.1 Select and skillfully implement high-quality and engaging instructional materials that support culturally and linguistically sustaining practices and foster deeper learning.

Evidenced Based Programs:

- **2.1B Supporting Curriculum Implementation:** Engage teachers in professional development linked directly to the curriculum and set up a process to regularly monitor the effectiveness of curriculum implementation.

- **2.1D Early Literacy Screening and Support:** Administer a reliable early literacy screening assessment to identify students who require additional support. Provide research-based interventions tailored to each student's learning needs and delivered by appropriately trained staff members.

MPS will continue to engage teachers in professional development linked directly to the curriculum and establish a process to monitor the effectiveness of curriculum implementation. For example, we support multilingual learners by aligning the Wit & Wisdom literacy curriculum to accelerate language development and increase the percentage of English learners in grades K-6 making progress on the ACCESS. Additionally, MPS will administer a reliable early literacy screening assessment in grade K-3 and provide interventions to meet students' learning needs. Disparities in performance between student groups are apparent as early as Kindergarten, and are particularly apparent in reading, emphasizing the need for early literacy interventions, as evidenced by percentage of ELs below grade level on iReady diagnostic assessments.

Submission Questions

Select the Focus Area(s) that your district will prioritize over the next three years to address the academic disparities identified in your data analysis. **checkbox**

Which Evidence-Based Programs (EBPs) will your district implement within this Focus Area? **checkbox**

Which schools will be impacted by these efforts (answer can be district-wide)? **open response - district-wide**

What is the anticipated amount of funding that will be allocated to this EBP over the next three years (FY25 + FY26 + FY27), across all funding sources? Total allocation should be cumulative. **numerical response - \$77,000 (FY25) +\$77,000 (FY26) + \$77,000 (FY27) = \$231,000**

Describe the anticipated allocation of funds to this EBP in more detail. **open response**
Not getting SOA money, but allocating our increase in Chapter 70 funds over the next three years.

The total investment in evidence-based strategies over the next three years will total **\$231,000**

Which budget foundation categories (G.L. c. 70) will be included in this anticipated annual allocation? **dropdown**

In addition to the lowest-performing student group target, what metrics will your district use to monitor progress on this EBP? Please keep in mind that you will be asked to report on progress on the target and metrics in your annual update to DESE starting next year. **open response**

MPS will use:

Increase in percentage of students meeting or exceeding on Math, ELA, and Science MCAS

Increase in MCAS Student Growth Percentile (SGP) on Math and ELA MCAS

Increase in iReady diagnostic performance in reading and math

Additional General Information & Resources From DESE

Introduction and Context

Student Opportunity Act Plans Background

The Student Opportunity Act (SOA) was enacted in 2019, injecting significant new funding into the Commonwealth's educational system, with a focus on providing funding to districts serving students with the greatest needs. The law also included a critical provision that requires every district to set clear targets for improving disparities in achievement among student groups and develop a three-year plan to implement evidence-based strategies to meet their targets.

The first set of three-year plans were submitted amid the backdrop of the COVID pandemic. The significant disruptions associated with the pandemic - including delays in SOA funding flowing to districts, the need for districts to spend significant time on recovery and reentry planning for all students, and interruptions to the Department of Elementary and Secondary Education's (DESE's) testing and accountability system - made it very difficult for districts to fully implement their SOA plans.

DESE is providing this updated guidance with the goal of supporting districts with the second round of three-year plans that will be due on April 1, 2024. In preparation for the release of this guidance, DESE engaged stakeholders in an effort to improve the process and took into consideration lessons learned from the first cycle of three-year plans.

District Improvement Plans vs. Student Opportunity Act Plans

Two key plans that districts produce on a regular basis are District Improvement Plans (sometimes framed as district strategic plans) and SOA plans. While both plans cover multiple years, there are some important differences.

The District Improvement Plan (DIP) serves as a comprehensive plan that describes the *full set of strategies* that a district will implement to support *all students* in their district. By contrast, the SOA Plan addresses a subset of a district's overall initiatives, focusing on evidence-based programs and strategies that will improve the educational experiences and outcomes of students, including English learners, students with disabilities, and low-income students. To that end, your district's SOA plan should spotlight critical, actionable evidence-based programs and strategies that are focused on rapidly improving outcomes for students with low academic performance, whether you are enhancing ongoing efforts or introducing a small number of new initiatives.

While DESE reviews DIPs on an intermittent basis and particularly as a part of district reviews, DESE reviews all SOA plans every three years and annual updates each year. DESE will be regularly monitoring SOA plans for each district to determine if they are employing evidence-based strategies to address persistent disparities in achievement.

DESE's Educational Vision and Strategic Objectives

Over the past year, DESE engaged in a process to update our [Educational Vision](#) and identify Strategic Objectives to guide our support to districts, focusing on recommended state-supported strategies that are grounded in evidence. With this in mind, this year DESE has embedded the Evidence-Based Programs (EBPs) that districts must identify in their SOA plans within the larger context of [DESE's Strategic Objectives](#).

Overview of Plan Requirements and Timeline

Student Opportunity Act (SOA) Plan Requirements

The Student Opportunity Act requires each district to create an evidence-based plan for reducing persistent disparities in achievement across student groups, which must be submitted for the commissioner's review on a

three-year cycle.

This guide is designed to support districts in developing a high-quality plan that meets all statutory requirements of the SOA. This guide is divided into the five sections that districts will need to complete to finalize their new three-year SOA plans:

1. Summarize Your District Plan
2. Analyze Your Data and Select Student Groups for Focused Support
3. Set Ambitious Three-Year Targets for Improving Student Achievement
4. Engage Families/Caregivers and other Stakeholders
5. Select Evidence-Based Programs and Strategies to Address Disparities in Achievement

Updated Features of the 2024 Guidance and Planning Process

- To help districts easily access the data they need to develop a thoughtful plan, DESE has created a new, publicly available [Student Outcomes Comparison Tool](#). This tool will enable districts to review data across student groups for critical indicators to pinpoint where disparities in learning experiences and outcomes are most prominent.
- At the heart of the SOA plan is the selection of **Evidence-Based Programs (EBPs)** that districts will use to drive improvements for selected student groups. This year, we have aligned the EBPs to DESE's new Educational Vision and [Strategic Objectives](#), along with a **recommended menu of metrics** that districts can choose to include in their plans.
- This year's guidance establishes an **improvement target for districts to include in their SOA plans** that focuses on the lowest-performing student group, along with the option for districts to establish additional targets to support individual student groups as needed based on their data analysis.
- Going forward, **districts will submit their SOA plans through GEM\$,** DESE's new online plan collection system. While the GEM\$ platform is also used for grants management, SOA Plans are not connected to grant funding.

Planning and Submission Timeline

- **December 2023:** 2024 SOA Plan submission guidance launched to all districts
- **January 2024:** 2024 SOA Plan addendum guidance launched to priority districts
- **Winter 2024:** Link to online plan submission form in GEM\$ will be shared with districts
- **April 1, 2024:** SOA Plans are due by 11:59 p.m. on April 1, 2024

As with the initial three-year SOA Plans, DESE also requires that the local School Committee vote on each district's 2024 SOA Plan prior to plan submission. Please plan to have your SOA Plan voted on in March to meet the April 1 deadline.

Please also consult the SOA Plan Example found in Appendix B for additional best practices in engaging stakeholders both in SOA Plan development and on an ongoing basis.

As required by law, districts will also submit progress updates to DESE for the two years following the three-year plan submission. The annual progress updates will include relevant data to assess the district's success in addressing persistent disparities in achievement among student groups as evidenced by progress towards meeting the district's targets, program implementation metrics, and any plan amendments. Districts must also post their SOA Plans publicly on their local websites; DESE will also publicly post all plans.

Resources to Complete SOA Plans

This section includes a list of tools and resources that may be useful to reference while developing your plan. If districts want to refer to information from their previous three-year plans, they can be accessed [here](#).

Analyze Your Data and Select Student Groups for Focused Support

- [Student Outcomes Comparison Tool](#). This dashboard highlights disparities in outcomes among student groups across indicators, customized for your district. This tool can support you in identifying student groups requiring targeted support as a starting point for deeper analysis.
- [DESE Coherence Guidebook](#). This guidebook contains information and resources on strategic planning for districts and schools, as well as an [Equity Pause Protocol](#) that can be used to identify equity gaps. Pages 4-5 reference different types of data to examine when doing a deeper analysis.

Set Ambitious Three-Year Targets for Improving Student Achievement

- [2023 District and School Accountability Reporting: Establishing the Lowest Performing Students Group](#). Explains the rationale and methodology for the lowest performing students group accountability measure.
- [DESE Security Portal](#). The composition of your district's "Lowest Performing Students" group can be accessed via the security portal. Please note that districts' three-year targets are currently being updated and more information will be shared in the coming weeks.

Engage Families/Caregivers and other Stakeholders

- [General Family Engagement Tools and Resources](#). This page includes links to family engagement tools and resources compiled by DESE's Office of Student and Family Support.
- [DESE's Planning for Success: Envisioning the Future Protocol](#). DESE's Planning for Success process includes resources to support districts to engage with stakeholders and families to develop a shared vision for the future (adapted from The School Reform Initiative's [Future Protocol](#)).

Select Evidence Based Programs and Strategies to Address Disparities in Outcomes

- DESE's [Strategic Objectives](#). This table outlines DESE's recommended list of Focus Areas, Evidence-Based Programs, and metrics to include in this section of the plan.
- [DESE's Educational Vision and Catalog of Aligned Supports](#). This guidebook includes detailed information about DESE's three strategic objectives as well as a catalog of DESE initiatives that are available to help interested districts build capacity in these areas.

DESE's Strategic Objectives, Evidence-Based Programs, and Metrics

The Department has identified examples of high-quality programs that the Commissioner encourages districts to consider when selecting evidence-based programs to support student groups. The Evidence-Based Program (EBP) examples identified by DESE are now aligned with DESE's new Educational Vision and Strategic Objectives. Robust implementation of these programs may touch on multiple program categories (A through I) outlined in the Student Opportunity Act, and a crosswalk for your reference is included below. This alignment is intended to provide coherence and clarity for districts as you engage in your planning.

On the next page is a table showing DESE's Strategic Objectives. This table includes Focus Areas, Evidence-Based Programs, and suggested metrics that may be included in your SOA plan. These metrics are intended to supplement the SOA Plan target (to improve achievement among the lowest-performing student group), serving as leading indicators of progress.

While each of the 2024 EBPs represent strong programmatic practices, districts are especially encouraged to consider and adopt EBPs designated as "priority EBPs" by the commissioner. The priority EBPs for the 2024 SOA plans are: Targeted Academic Support and Acceleration; Comprehensive Approach to Early Literacy and Early Literacy Screening and Support; Expanded Access to Pre-K; High Quality Secondary Pathways and Programs; and Enhanced Pathways to Increase Educator Diversity. The priority EBPs are bolded in the crosswalk below.

Evidence Base

The Department's How Do We Know? website reflects the analysis we have done to highlight programming and strategies that are most likely to have the greatest impact on students along with the essential implementation elements necessary to support these strategies. This website includes a [specific resource documenting evidence](#)

[aligned to the Strategic Objectives and Focus Areas](#). The website also has many resources for districts interested in diving more deeply into the evidence base behind certain programs and strategies.

SOA Program Categories and 2024 Evidence Based Programs (EBPs) Crosswalk

SOA Program Category	2024 EBPs as referenced in the Strategic Objectives table below
A) Expanded Learning Time in the form of a longer school day or year	2.2D Targeted Academic Support and Acceleration ; 2.4B Extended Learning Time; 2.4D Diverse Enrichment Opportunities
B) Increased opportunity for common planning time for teachers	2.2C Collaborative Teaching Models; 3.3B Support for Effective Team Practices; 3.3C Collaborative Labor Management Partnerships
C) Social services to support students' social-emotional and physical health	1.1A Integrated Services for Student Wellbeing; 1.1B Enhanced Support for SEL and Mental Health; 1.1C Positive School Environments; 1.2A Effective Student Support System; 1.2B Comprehensive Tiered Supports
D) Hiring school personnel that best support improved student performance	3.1A Intentional Hiring Systems; 3.1C Educator Preparation Partnerships
E) Increased or improved professional development	1.3A Diverse Approaches to Meaningful Family Engagement; 2.2A Effective Use of WIDA Framework; 2.2B High Leverage Practices for Students with Disabilities; 3.2C Pathways for Professional Growth and Leadership
F) Purchase of curriculum materials and equipment that are aligned with the statewide curriculum frameworks	2.1A Inclusive Curriculum Adoption Process; 2.1B Supporting Curriculum Implementation; 2.1C Comprehensive Approach to Early Literacy ; 2.1D Early Literacy Screening and Support
G) Expanded early education and pre-kindergarten programming within the district in consultation or in partnership with community-based organizations	2.4A Expanded Access to Pre-K
H) Diversifying the educator and administrator workforce	3.1B Enhanced Pathways to Increase Educator Diversity ; 3.2A Inclusive School Communities; 3.2B Retention Support Programs
I) Developing additional pathways to strengthen college and career readiness	2.3A Authentic Postsecondary Planning; 2.3B High-Quality Secondary Pathways and Programs
J) Any other program determined to be evidence-based by the commissioner	1.3B Students and Families as Valued Partners; 2.4C Effective Programming for Multilingual Learners; 3.3A Resources Allocation Aligned to Student Success

Strategic Objectives Table

Strategic Objective 1: Cultivate systems to support the whole student and foster joyful, healthy, and supportive learning environments so that all students feel valued, connected, nourished, and ready to learn		
Focus Area	Evidence-Based Programs	Suggested Metrics
1.1 Promote students' physical and mental health and wellness in welcoming, affirming, and safe spaces	1.1A Integrated Services for Student Wellbeing: Utilize a system for integrating services and aligning initiatives that promote students' behavioral and mental health and wellness (e.g., bullying prevention, trauma sensitivity, dropout prevention, truancy reduction, foster care and homeless youth education, and inclusion of students with disabilities)	<u>Local Metrics</u> <ul style="list-style-type: none"> Change in select indicators from local student surveys that measure school culture/climate and student mental health and wellbeing Increase in implementation of Tier 1 SEL curriculum Change in social and emotional competency rates as measured by SELIS or local data Change in select indicators on local family surveys Increase in participation rates for SEPAC/ELPAC and/or other stakeholder groups
	1.1B Enhanced Support for SEL and Mental Health: Expand capacity to address social-emotional learning (SEL) and mental health needs of students and families (e.g., build knowledge and skills of staff, add specialized support staff, partner with community-based providers, strengthen plans for responding to behavioral health medical emergencies, etc.)	
	1.1C Positive School Environments: Create school environments that include high-quality facilities, healthy meals, physical activity, and positive youth development activities for all students	
1.2 Implement a multi-tiered system of supports (MTSS) that helps all students progress both academically and in their social, emotional, and behavioral development	1.2A Effective Student Support System: Implement key systems to build an effective approach to MTSS (e.g., using data to identify students' strengths and needs, matching students with appropriate supports, and monitoring progress)	<u>DESE Provided Metrics</u> <ul style="list-style-type: none"> Increase in student perception of school culture and climate as measured by VOCAL data Decrease in discipline rates Decrease in out of school suspension and expulsion rates Decrease in chronic absenteeism rates Decrease in dropout rates
	1.2B Comprehensive Tiered Supports: Provide a comprehensive set of tiered supports for all learners across all three domains - academic, social/emotional, and behavioral - that are culturally sustaining and universally designed	

<p>1.3 Develop authentic partnerships with students and families that elevate their voices and leadership in decision-making and connect them to their communities</p>	<p>1.3A Diverse Approaches to Meaningful Family Engagement: Train all staff on multiple strategies and tools to engage with families in meaningful two-way communication</p> <p>1.3B Students and Families as Valued Partners: Create opportunities and systems for students and families to effectively participate as partners in authentic decision-making, with supports as needed</p>	
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Strategic Objective 2: Promote deeper learning so that all students engage in grade-level work that is real-world, relevant, and interactive		
Focus Areas	Evidence-Based Programs	Suggested Metrics
<p>2.1 Select and skillfully implement high-quality and engaging instructional materials that support culturally and linguistically sustaining practices and foster deeper learning</p>	<p>2.1A Inclusive Curriculum Adoption Process: Implement a comprehensive and inclusive curriculum adoption process that engages multiple stakeholders in the exploration and assessment of potential instructional materials</p> <p>2.1B Supporting Curriculum Implementation: Engage teachers in professional development linked directly to the curriculum and set up a process to regularly monitor the effectiveness of curriculum implementation</p> <p>2.1C Comprehensive Approach to Early Literacy: Develop and implement a comprehensive approach to early literacy education that is supported by high-quality literacy core curricular materials that encompass foundational skills</p> <p>2.1D Early Literacy Screening and Support: Administer a reliable early literacy screening assessment to identify students who require additional support. Provide research-based interventions tailored to each student's learning needs and delivered by appropriately trained staff members</p>	<p><u>Local Metrics</u></p> <ul style="list-style-type: none"> ● Increase in HQIM adoption rates ● Increase in efficacy of HQIM implementation as measured by classroom walkthrough tools ● Increase in usage of approved literacy screeners and adoption of comprehensive early literacy curriculum ● Decrease in students requiring Tier 2 and Tier 3 supports as measured by local data ● Increase in MyCAP participation and engagement rate ● Increase in Pre-K seats/enrollment ● Increase in Kindergarten readiness rates as measured by local data ● Increase in Dual Language Education (DLE) seats/enrollment ● Increase in academic language achievement of English learners as measured by local data ● Increase in student participation in arts and enrichment
	<p>2.2 Use the MTSS process to implement academic supports and interventions that provide all students, particularly students with disabilities and multilingual learners, equitable access to deeper learning</p>	<p>2.2A Effective Use of WIDA Framework: Train all staff to effectively employ the WIDA framework so they can provide effective scaffolds and supports for multilingual learners</p> <p>2.2B High Leverage Practices for Students with Disabilities: Train all staff in high-leverage instructional practices designed for students with disabilities. (e.g., providing scaffolded supports, explicit instruction, flexible grouping, and adapting curriculum and tasks based on students' specific learning goals)</p> <p>2.2C Collaborative Teaching Models: Develop or expand co-teaching and other evidence-based models that leverage collaboration to best-serve students with disabilities and multilingual learners</p> <p>2.2D Targeted Academic Support and Acceleration: Implement academic intervention and acceleration opportunities targeting student groups demonstrating the largest gaps in achievement (e.g., high dosage tutoring, Acceleration Academies, and summer learning)</p>

Strategic Objective 2: Promote deeper learning so that all students engage in grade-level work that is real-world, relevant, and interactive		
Focus Areas	Evidence-Based Programs	Suggested Metrics
<p>2.3 Reimagine the high school experience so that all students are engaged and prepared for post-secondary success</p>	<p>2.3A Authentic Postsecondary Planning: Implement a process that engages students in authentic postsecondary planning through a continuum of learning focused on the unique interests, skills, and talents of each individual student</p>	<ul style="list-style-type: none"> ● Increase in pathway/program enrollment rates ● Increase in completion of advanced coursework rates ● Increase in FAFSA completion rates ● Increase in 4- and 5-year graduation rates ● Increase in college enrollment/persistence rates
	<p>2.3B High-Quality Secondary Pathways and Programs: Pursue designation and implementation of high-quality pathways and programs (e.g., Early College, Chapter 74 Career Technical Education including After-Dark programs, Innovation Career Pathway programs, Career Connections programs, and/or other career-connected activities)</p>	
<p>2.4 Develop a coherent and holistic range of programming that is responsive to the needs and interests of diverse learners</p>	<p>2.4A Expanded Access to Pre-Kindergarten: Expand access to full-day, high-quality pre-kindergarten programs for 4-year-olds, including potential collaborations with local providers</p>	
	<p>2.4B Extended Learning Time: Add time to the school day or year for all students and creatively reorganize the school day/year to both enhance the quantity and quality of core instruction and to offer expanded enrichment opportunities</p>	
	<p>2.4C Effective Programming for Multilingual Learners: Develop or enhance research-based programs for multilingual learners that support and sustain students' native languages while also addressing their educational needs and language development</p>	
	<p>2.4D Diverse Enrichment Opportunities: Provide students with a diverse array of opportunities to engage in arts, music, enrichment, electives, athletics, and world language courses</p>	

Strategic Objective 3: Develop and sustain a workforce that is diverse, culturally responsive, well-prepared, and committed to continuous improvement, so that all students have equitable access to effective educators		
Focus Areas	Evidence-Based Programs	Suggested Metrics
3.1 Develop an increased and robust pipeline of diverse and well-prepared educators and leaders	3.1A Intentional Hiring Systems: Develop intentional hiring systems and processes that start earlier, include a diverse group of stakeholders, and offer support to teams to identify and mitigate biases	<u>Local Metrics</u> <ul style="list-style-type: none"> ● Increase in the diversity of educators and leaders ● Decrease in gap between student demographics and staff demographics ● Increase in retention of effective educators as measured by local data ● Decrease in equity gaps in student access to educators who are experienced, effective, and teaching in-field as measured by the Student Learning Experience report in Edwin ● Change in select indicators from local educator surveys ● Increase in % of staff participating in selected professional learning opportunities <u>DESE Provided Metrics</u> <ul style="list-style-type: none"> ● Increase in diversity of educators ● Increase in diversity of educators, new hires
	3.1B Enhanced Pathways to Increase Educator Diversity: Develop or enhance pathways designed to intentionally attract a diverse pool of candidates (e.g., education-specific pathways for local high school students, “grow your own” teacher preparation programs, and paraprofessional pipelines)	
	3.1C Educator Preparation Partnerships: Partner with educator preparation providers to promote and leverage student teacher placements and other partnerships that result in strong, effective, long-term hiring pipelines	
3.2 Create the conditions to sustain and retain diverse and effective staff, particularly those who entered the field through alternative pathways	3.2A Inclusive School Communities: Train all staff in strategies to create an equitable and culturally and linguistically sustaining environment that fosters a sense of belonging for students, families, and staff	
	3.2B Retention Support Programs: Establish or expand induction, mentoring, feedback programs, and affinity groups that are carefully designed to offer targeted support for retaining staff from underrepresented backgrounds, ensuring their sustained engagement and success	
	3.2C Pathways for Professional Growth and Leadership: Create specific roles and/or structures that offer staff professional growth and leadership development (e.g., leaders-in-training programs, coaching roles, etc.)	

<p>3.3 Implement opportunities for all staff to engage in a cycle of continuous improvement, utilizing effective teaming structures</p>	<p>3.3A Resource Allocation Aligned to Student Success: Implement a systematic and ongoing process to allocate resources including people, time, funding in alignment with district and school priorities to promote student success</p> <p>3.3B Support for Effective Team Practices: Districts and schools provide all staff with robust training, additional common planning time, and ongoing support in implementing effective team processes, use of protocols, and effective data use as a part of a cycle of inquiry</p> <p>3.3C Collaborative Labor-Management Partnerships: Districts and schools establish and/or maintain collaborative labor-management partnerships to improve student performance</p> <ul style="list-style-type: none"> ● Increase in principal retention rates ● Increase in rate of educators converting emergency licensure to initial as measured by local data ● Increase in diversity of educators earning provisional/initial licensure
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