



**World's Best Workforce & Annual Report
2016-2017**



It all starts with us...

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School Information

Contact Information

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Grades/Ages Served

Charter School: Kindergarten through 6th grade
Children's House Program: Ages 3-6

Year Opened

Swan River Montessori Charter School opened in 2005.

Mission

The mission of SRMCS is to provide a child-centered environment for self-directed and personalized learning in a small community based public school with an emphasis on the natural environment.

Vision

Swan River Montessori Charter School's vision is to employ an inter-disciplinary approach to education by teaching the whole child (heart, mind, and soul). The Montessori learning environment is designed to foster this whole child approach by meeting the child's inherent needs of self-discovery, creativity, independence, and competence.

Swan River Montessori Charter School will create a kind, respectful environment where each child has a sense of belonging. Learning at Swan River Montessori Charter School involves the student, the student's family, the teachers, and the larger community. Swan River supports family and community participation in each child's education by utilizing and appreciating community resources and the natural world as a learning environment.

Authorizer Information

The authorizing mission of the Audubon Center of the North Woods (ACNW) Charter School Division is to provide superior oversight, evaluation, feedback and strategic support to its authorized schools resulting in increased academic, financial, operational, and environmental education performance of each school.

The authorizing vision of ACNW is to authorize a portfolio of high performing charter schools that instill a connection and commitment to the environment in their school communities, while working towards a healthy planet where all people live in balance with the Earth.



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Director of Charter School Authorizing

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SRMCS and ACNW: A Brief History

The relationship between Swan River Montessori and Audubon Center of the North Woods began in 2004 when the school's sponsorship was made official by the State of Minnesota. During FY16, our second contract term with ACNW ended, thus, the year was largely dedicated to the contract renewal process. We are proud to announce that our third 5-year contract term with Audubon began July 1, 2016 inclusive of new and updated goals in the areas of academics and environmental education.

ACNW has been an integral part of our school since we opened our doors in 2005. They have provided guidance in many areas including school environmental stewardship, board governance, financial oversight, and academic accountability. Our relationship with Audubon is strong and we look forward to many more years partnering with their organization as our authorizer.

Purpose of the Annual Report

This report is prepared annually by the SRMCS administration and approved by its Board of Directors. Its purpose is to tell our story to the Minnesota Department of Education; our Authorizer, Audubon Center of the North Woods; the SRMCS community; and the community at large.

Implementation of Primary & Additional Statutory Purposes

Minnesota Statute 124E.01, sub. 1 (formerly known as 124D.10, sub. 1)

As written in the statute:

“The primary purpose of all charter schools is to improve all pupil learning and all student achievement.”

As Montessorians, we believe that pupil learning is a natural, internally motivated process that is inherent in every child. Simply stated, every child wants to learn. Our job as a Montessori charter school is to provide an appropriate and prepared environment that is conducive to how a child desires to learn and the pace in which it is done. If we follow the child and respect how each absorbs information, student learning becomes enjoyable and inevitable. When student



learning is enjoyable and inevitable, student achievement increases as a natural response. Therefore, our teachers spend a large portion of their time ensuring each classroom has a variety of learning materials in each subject area, that these materials are well-maintained, organized, and sequenced correctly, and that each student understands how to use these materials to gain the knowledge s/he is seeking. We also provide the freedom for students to make choices about what materials to use and how long and how often they wish to use them. By giving this type of respect to each child, no matter what his/her learning style and pace is, anyone would see how each rises to the occasion.

The five additional purposes listed in statute are listed below and include our methods of implementation underneath each point.

- (1) Increase learning opportunities for all pupils;
 - a. Being a Montessori school, SRMCS offers a variety of materials in each academic subject as well as a variety of materials for each category within said subject. For example, within the subject area of mathematics, there are four operations – addition, subtraction, multiplication, and division. Not only may a child choose which operation to work with, they also choose from a variety of materials within each operation. Addition alone has anywhere from 5-10 different types of materials to support learning how to add both concretely and abstractly.
 - b. Outside of the general education classrooms, Swan River also provides additional learning opportunities that perhaps other schools would not or could not provide due to sheer size. Because Swan River can cap its enrollment numbers, we have

control over keeping our class sizes smaller. This allows us to provide more 1:1 teaching time, we can easily use the outdoors as a classroom because supervision is more manageable, we have assistants in each classroom for additional support (and keeps our student to teacher ratios low), and we are able to provide additional instruction in areas like environmental education consistently and without time/scheduling issues.

(2) Encourage the use of different and innovative teaching methods;

- a. Our students have three primary freedoms as part of our educational method. First, they have the freedom of movement – students may move throughout the classroom and work in any area of the room as they choose without needing the permission of an adult so long as it is purposeful. Second, they have the ability to choose. This includes what material they wish to use, where to use it, and how long. Finally, they are given the freedom to repeat. People often underestimate this freedom because we tend to think that if we have done something once and done it well, then we do not need to do it anymore. We believe the opposite is true. Encouraging students to repeat solidifies knowledge and solidified knowledge leads to mastery and mastery is our ultimate goal.

(3) Measure learning outcomes and create different and innovative forms of measuring outcomes;

- a. There are two primary means of measuring progress in a Montessori setting outside of standardized assessments.



- i. Observation – It is very common for a Montessori teacher to spend a portion of his/her day sitting quietly in the classroom to observe and take notes on students. Specifically, they look for purposeful movement, level of student engagement, potentially struggling students who may need additional support of some kind, and students who are showing mastery of a particular material/topic.
- ii. Peer Teaching – When a child has mastered a particular topic, it is very common that the teacher may ask that child to teach or support another child who hasn't yet. The idea behind this is simply that if a child has the knowledge to teach another, it not only proves mastery, but builds the self-esteem and level of independence of the child being given that special responsibility.

(4) Establish new forms of accountability for schools;

- a. Being a small charter school, we have the ability to establish and hold higher accountability standards more closely than perhaps a large district with numerous

schools could. Rather than relying primarily on quantitative assessment data, we are able to incorporate a deeper level of accountability. Examples include

- i. collecting thorough, specific data on student and parent satisfaction;
- ii. teachers are able to provide detailed, quality evaluations of the school director and vice versa;
- iii. The school board and its members are more easily accessible to families, teachers, and the community. They know our teaching staff well, including individual strengths and weaknesses; and
- iv. The relationship between SRMCS and its authorizer, Audubon Center of the North Woods, is a positive, supportive partnership rather than hierarchical system. This type of relationship encourages increased dedication to our school and its educational method. Our authorizer is yet one more means of holding Swan River accountable for pupil learning.

(5) Create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the school site.

- a. One of the foundational differences between traditional districts and charter schools is that a charter is its own district and, therefore, has its own school board. Additionally, the members of the school board include licensed teachers who work for the school. This allows decisions to be made with the direct input and voting rights of the teachers themselves.

Student Enrollment & Demographics

Number of Students Enrolled

Since SRMCS opened its doors in 2005, we have been fully enrolled at every grade level with waiting lists. We have been fortunate with respect to enrollment as most of our families find us via word-of-mouth.

Below is a chart which provides trending enrollment data by grade level.

| | 2013-2014 | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 (est.) |
|---------------------------------------|------------|------------|------------|------------|---------------------|
| Kindergarten | 24 | 19 | 24 | 25 | 24 |
| 1st Grade | 23 | 21 | 22 | 26 | 25 |
| 2nd Grade | 29 | 24 | 25 | 24 | 26 |
| 3rd Grade | 20 | 28 | 28 | 24 | 22 |
| 4th Grade | 22 | 19 | 27 | 27 | 23 |
| 5th Grade | 21 | 20 | 19 | 25 | 22 |
| 6th Grade | 5 | 15 | 4 | 8 | 10 |
| Average Daily Membership (ADM) | 144 | 146 | 149 | 159 | 152 |

Key Demographic Trends

Looking at the data provided below, trends regarding demographics have remained consistent. The City of Monticello is composed largely of Caucasian and Latino families. While there is little we can do about the surrounding racial demographics, it is part of Swan River’s mission to provide a Montessori education free of charge to all families who seek it. Therefore, we make providing any sort of financial assistance a priority. This includes scholarships for field trips, snack programs, and promotion of the Free and Reduced Lunch Program

| Demographic Trends | 2013-2014 | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 (est.) |
|--------------------|-----------|-----------|-----------|-----------|------------------|
| Total Enrollment | 144 | 146 | 149 | 159 | 155 |
| Male | 66 | 67 | 62 | 73 | 76 |
| Female | 78 | 80 | 87 | 86 | 79 |
| Special Education | 35 | 37 | 24 | 36 | 30 |
| LEP | 0 | 0 | 0 | 0 | 0 |
| African American | 0 | 0 | 0 | 2 | 2 |
| Latino | 7 | 8 | 5 | 6 | 1 |
| Asian/PI | 2 | 4 | 3 | 3 | 2 |
| American Indian | 1 | 3 | 2 | 2 | 1 |
| White | 134 | 131 | 139 | 146 | 149 |
| F/R Lunch | 19 | 14 | 12 | 16 | 16 |

Student Attendance, Attrition & Mobility

Attendance

Overall, student attendance at SRMCS is very positive. Since we opened in 2005, we have had very little issue with excessive student tardiness or absenteeism, which is reflected by our 95%+ yearly attendance rates.

| | 2012-13 | 2013-14 | 2014-2015 | 2015-2016 | 2016-2017 |
|--|---------|---------|-----------|-----------|---------------|
| Overall Student Attendance Rate | 96.26% | 96.37% | 95.69% | 96.02% | 95.84% |

Attrition

There are three primary reasons that a student may dis-enroll from our program.

1. 5th grade students often choose to attend their local middle school for 6th grade.
2. The family relocates to a residence too far away to commute to Swan River.
3. A student chooses to enroll in his/her home or other school district.

The following table offers statistical insight into student attrition/retention trends at SRMCS.

| Reason for Dis-enrollment | 2012-2013 | 2013-2014 | 2014-2015 | 2015-2016 | 2016-2017 |
|---|------------------------|------------------------|------------------------|------------------------|------------------------|
| Transferred to Local Middle School for 6 th Grade | 13/147 = 8.8% | 5/144 = 3.4% | 5/146 = 3.4% | 9/149 = 6.0% | 11/159 = 6.9% |
| Relocation of Primary Residence | 4/147 = 2.7% | 1/144 = 0.6% | 0 | 0 | 0 |
| Transfer to Student's Home District | 3/147 = 2.0% | 1/144 = 0.6% | 1/146 = 0.6% | 1/149 = .06% | 2/159 = 1.2% |
| Total % of Students to Dis-Enroll | 20/147 = 13.5% | 7/144 = 4.9% | 6/146 = 4.1% | 10/149 = 6.7% | 13/159 = 8.1% |
| Total % of Students Continually Enrolled Between Oct. 1, 2015 and Oct. 1, 2016 | 130/150 = 86.7% | 137/144 = 95.1% | 140/146 = 95.8% | 139/149 = 93.3% | 146/159 = 91.8% |

As detailed, the retention rate of students averages approximately 91.8%. It is our goal each year to educate our families on the benefits of staying at Swan River for 6th grade. However, SRMCS also understands the desire to begin at the local middle school for 6th grade with the child's peers from the Monticello School District that our school resides in. We also expect a small percentage of families to relocate each year.

Student Mobility

| | October 1 ADM | Mid-year Transfers In | Mid-year Transfers Out | Total Mid-year Transfers | Mobility Index | % of Students Enrolled 95%+ |
|------------------|---------------|-----------------------|------------------------|--------------------------|----------------|-----------------------------|
| 2012-2013 | 147 | 5 | 2 | 7 | 4.7% | 95.3% |
| 2013-2014 | 145 | 1 | 1 | 2 | 1.3% | 98.7% |
| 2014-2015 | 149 | 1 | 4 | 5 | 3.3% | 96.7% |
| 2015-2016 | 149 | 0 | 1 | 1 | .06% | 99.9% |
| 2016-2017 | 159 | 2 | 2 | 4 | 2.5% | 97.5% |



Children's House visits the local fire station!



Educational Approach and Curriculum

Our Approach to Education

The Montessori Method is a proven alternative to conventional education and has a philosophy unparalleled by other traditional teaching methods. It is primarily based on child development and the understanding that children have an innate desire to learn. We believe that the child is a motivated doer, not simply an empty vessel to be filled with information. Children in our classrooms are active, highly independent learners.

SRMCS is an authentic Montessori School. Our lead teachers are not only licensed by the State of Minnesota, but also hold Montessori certification at the level they teach. We pride ourselves by having a full range of Montessori materials in every classroom.

Two classic characteristics of a Montessori environment is that 1) it contains children whose ages span across three years and 2) retains students in 3-year cycles. Children's House is home to students ages 3 through kindergarten. Elementary Level I, or E-1, includes first through third grade while Elementary Level II, or E-2, is fourth through sixth grade. During the three-year cycle, children play different roles, the greatest being leadership earned by the third-year students (kindergarten, 3rd grade, and 6th grade). These students become role models and are looked upon to assist the teacher by setting a good example and being helpful to younger students. Student contributions to the classroom community are only one element of Montessori education that builds self-esteem and self-reliance.

Just as the role of the child in a Montessori classroom is different, so is the role of the teacher. Rather, s/he is more that of a director, guide and mentor. The teachers do not teach from textbooks. They present Montessori lessons and prepare their classrooms with hands-on materials and resources that students use to build an understanding of the concepts presented.



Without textbooks, Montessori students rely on multiple sources to research the topics they are studying. The classrooms have their own libraries of nonfiction books about science and social studies topics. Our students also use the local library and the internet for research. Students are shown how to research and find answers to a wide variety of questions. In other words, teachers are not used as a source for answers, but as a *resource to find information* so the student can answer his/her own questions independently.

School Goals & Benchmarks for Instruction and Student Achievement

Per our contract with Audubon Center of the North Woods, the SRMCS lead teaching staff worked together to create reasonable, yet challenging goals to be met on a yearly basis. The majority of these goals are based on growth and proficiency targets as determined by MCAs, Aims Web and Fountas & Pinnell assessment results. Other components include science and

environmental education goals. For more information on these goals, as well as student results, please see the Academic Performance section of this report.



Alignment to State Standards

The Montessori Method does a very good job providing thorough instruction in all subject areas. However, we recognize that our approach may not transparently reflect Minnesota State Standards. To address this issue and as part of our renewal process, all K-6th grade lead teachers met regularly in FY16 to align the Montessori math curriculum/materials to state math standards. The first half of FY17 was spent aligning reading curriculum to state standards. The second half of FY17 was designated to science and social studies. Administration is responsible for staying updated on any state standard changes and relaying these updates to all relevant staff members so continued curriculum alignment can take place.

Remediation & Acceleration Practices

Students Needing Additional Support: If a student is flagged for needing additional support beyond what is offered in the general education classroom, his/her name is brought to the Child Find Team. This team is comprised of the lead classroom teacher, the Special Education staff, the School Director, and, when necessary, the Special Education Director. The purpose of this team is to brainstorm interventions for students that teachers have concerns about. These interventions are done for a minimum of 4-6 weeks. Once complete, the team receives an update on student progress. If progress is made, the teacher is encouraged to continue with the successful interventions being used. If progress is low or absent, the team discusses if additional interventions should be used or if the student should be referred for a special education evaluation.

SRMCS also employs an on-site student specialist to work with students who have been flagged by teachers as needing additional help with reading or math, but do not qualify for special education services. This specialist is fully trained on the Sue Barton Reading System.

Students Requiring Acceleration: In the event that grade acceleration would be appropriate for a student, SRMCS does have a policy in place outlining the steps that must be taken. To view this policy in its entirety, please visit our web site at www.swanrivermontessori.org.

Special Education

SRMCS is fortunate to have excellent staff in the Special Education Department. All students with I.E.P.s (Individualized Education Plans) have their needs met as they would in any other traditional school. However, due to the size and scope of our program, specialized services such as speech, occupational therapy, physical therapy, etc. are contracted externally.

English Learner Program

Every student enrolling at SRMCS receives a Home Language Questionnaire (HLQ) prior to his/her first day of school. On this form, the parent(s) of the incoming student must identify the primary language spoken in the home environment. Should any other language other than English be indicated, an ELL (English Language Learner) Team meeting would be called inclusive of the school director, the child's general education teacher, one special education teacher, and at least one parent to discuss any potential language-learner needs the child may have. The team would also decide on the need for an additional language assessment and/or an individualized educational program.

If a parent indicates that the primary language spoken at home is English, but school staff believes there are language-learner needs, an ELL Team meeting would be called to discuss next steps that may need to be put in place to support the student.

SRMCS does not currently have any students who are qualified as being ELL and, therefore, does not have an English Learner Program at this time.

School Staff & Our Educational Mission

“The mission of SRMCS is to provide a child-centered environment for self-directed and personalized learning in a small community based public school with an emphasis on the natural environment.”

Every staff member of SRMCS has been meticulously chosen based on the perceived ability to understand and adhere to the Montessori Method of Education. All members are trained (to varying degrees depending on the position) to understand and support the following:

- Allowing and encouraging self-directed decisions, especially regarding work choices.
- Understanding and supporting the idea that learning occurs in numerous ways and in varying styles, both in a classroom and other environments (the home, the outdoors, out in the community).
- Building independence within the child is a priority at all times even if that means witnessing “mistakes.”
- The environment, whatever it may be, belongs to the child, not the adult.
- Our job is not to force, but to guide.
- Respect from the child is earned, not demanded.
- With some minor exceptions, we teach to the individual child, not the group as a whole.

The School Board and the administration understand that the Montessori philosophy is not for everyone. If a staff member finds that this style of education is not conducive to his/her own style, we certainly respect that and understand if the working relationship is severed.



School Calendar & Daily Schedule

School Calendar: SRMCS mirrors its annual school calendar from Monticello School District #882 because our students utilize their bussing services. Therefore, we are closed the same days, hold the same holiday/vacation schedules, and hold all early dismissal days as they do. During 2016-2017, there were 173 scheduled instructional days with school starting at 9:10 a.m. and ending at 3:20 p.m. This equals approximately 370 minutes per day and 64,010 minutes per year.

To view the board approved 2016-2017 school calendar, please see Attachment 1.



General Daily Schedule: While there are numerous changes that may take place during any school day due to specials classes (physical education, technology, art, environmental education, etc.), the following is a general student schedule:

- 7:00 A.M. Extended Care (contracted families only)
- 9:10 School begins
Work/lessons in the classroom
- 12:00 Lunch
- 12:30 Recess
- 1:00 Work/lessons in the classroom
Specials classes
- 3:20 Dismissal
- 3:30 P.M. Extended Care (contracted families only)

Innovative Practices and Implementation

The Montessori Method in and of itself is continuously innovative in its standard practice. Lessons are tailored to meet the needs of each individual student. There are also numerous materials to teach certain concepts to students. We understand that every student learns differently both in style and in time. Therefore, when giving a student a lesson in addition, for example, the teacher may choose a specific type of addition material based on that student's learning style and ability. Another student may use an entirely different type of addition material. A third student might use both materials. In an authentic Montessori classroom, there may be upwards of 5-10 different types of materials to teach the same concept. If a student's needs are not met within those options, the teacher would look to other classrooms for additional material or will often make material by hand.

Another key component of Montessori and SRMCS is the way in which we follow the child. If a child shows particular interest in a subject, the Solar System being an example, that student may study that topic in an array of different ways. The student could choose to write a research report, create a diorama, create a scale model, put together a poster board, and/or orally present to his/her classmates. The options are endless. We find this means of educating students to be innovative and very effective.

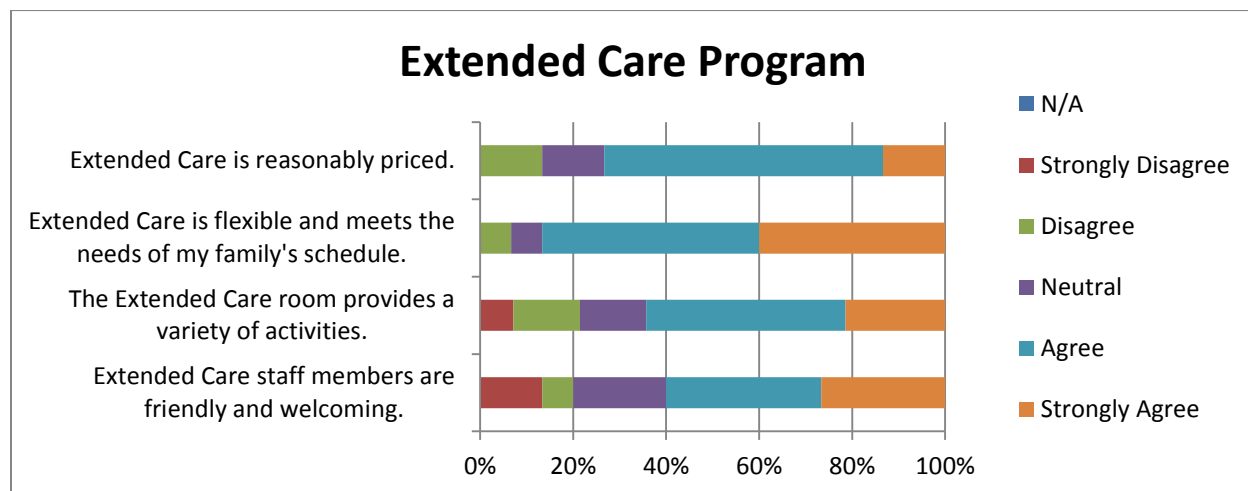
Other key components of Swan River and the Montessori Method which we believe set us apart from other schools include:

- Classrooms featuring mentoring relationships that are developed and nurtured over several years.
- There is an emphasis on the social/emotional component as part of our holistic approach (along with cognitive and motor) to child development.
- Montessori provides an “amoeba-like” curriculum that can change its shape to meet the needs of the child, not a system of education that seeks to mold individuals into one unit.
- We utilize a curriculum that features the interrelatedness of subject areas, not just stacks of unrelated facts.
- We use a pace of learning that is individualized, encouraging and accepting, not critical, grading, or a-motivational.

Extended Care Program & Passport to Adventure Summer Program

Extended Care Program: Since our doors opened in 2005, SRMCS has operated a Fund 4 Extended Care Program for all enrolled families if needed. This program is open each school day beginning at 7:00 am and closes at 5:30 pm. All service is contracted with individual families based on the needs of that family. We offer very flexible scheduling and have often provided emergency care when those situations arise. This program is staffed by many of our hourly staff members based on the number of children enrolled daily. Our goal in operating this program is not make a profit (we have only raised the cost one time in twelve years), but to be a convenient, safe place for children to attend while their parents work. Monticello has a large commuting population driving into the Twin Cities every day which is why this program has sustained high enrollment over the years.

In an ongoing effort to improve our programs at Swan River, families were asked for feedback regarding Extended Care on the family survey in the spring of 2017. The responses were as follows:



Passport to Adventure Summer Program: After a year off due to the ongoing construction of our second building, SRMCS excitedly brought back its summer program “Passport to Adventure” 2017. As we had done in 2014 and in a continued effort to maintain both the quality and attendance from that year, the staff held numerous meetings to ensure the daily schedule, types of field trips, and, most importantly, the educational component were prioritized and enhanced.

As educators, we know research has proven for decades that children tend to lose up to 1/3 of what they learned during the school year over the summer months. Our primary goal with our summer program is to, at minimum, maintain all our students’ skills. Needless to say, the response from families was very positive. We had steady summer enrollment, students maintained academic skills, and it was all balanced with fun field trips, weekly themes, and lots of play time!



Early Childhood Program

Swan River Montessori Charter School is a school based on the Montessori philosophy of education developed by Dr. Maria Montessori. Early education is a foundational component to any Montessori school, and as such, the preschool program is an integral part of the school’s overall approach to education. In the Montessori model, the preschool children (ages 3 to 5) are combined with the kindergarten students in what is

known as the Children’s House. Montessorians believe that children at this stage of development are in a “sponge-like” phase of learning. The Montessori environment takes advantage of this unique timeframe by introducing children to what many people believe are concepts far too difficult for this age group to understand. Examples include introduction to phonograms, the Scientific Method, all four math operations, and even highly abstract concepts such as fractions, if the child is ready.

Montessori schools use a spiral curriculum, meaning concepts learned and materials used in the Children’s House are expanded upon and revisited as the child continues through his/her academic career. The sooner a child is exposed to the Montessori curriculum, the sooner s/he can absorb key concepts and skills, solidifying a vast base of knowledge for the child to draw upon. Simply stated, our Children’s House program is the beginning of the Montessori educational journey, creating an academic foundation which is built on in the years that follow.

Enrichment/Extra-Curricular Programs



During the 2016-17 school year, SRMCS had the privilege to offer five amazing after school programs in addition to our Extended Care Program.

Lego Club: Ms. Amy Jensen, a Swan River E-1 teacher, organized a Lego Club based on her personal passion for engineering. This club met after school most Wednesdays for one hour.

Sewing Club: Ms. Rebecca Brown, a Swan River early childhood teacher, provided after school sewing clubs (beginners, intermediate, and advanced) open to students kindergarten through 6th grade. By the end of this multi-week class, all students finished their grand projects – sewing their very mermaid tale blankets and hooded beach towels!



Woodshop: Ms. Barb, a Swan River early childhood classroom assistant, who is very skilled in woodworking, offered an after school woodshop club for students grades 1-6. Projects included yard dice for outdoor Yatzee, toolboxes and flower pot benches.

Book Club: Ms. Julie Halvorson, our Literacy Specialist, and Ms. Amy Savage, a Swan River kindergarten teacher, worked together again this year to offer a book club for students age 3 through 3rd grade. There were two primary purposes for this club. The first was to provide our students with additional opportunities to strengthen their love of reading. The second was to use this club as a means to work toward our state's Reading Well by Third Grade goal.



S.T.E.M. Club: New in FY17 and in addition to Lego Club, Ms. Amy Jensen taught an after-school S.T.E.M. club for interested students in grades 1-6. This class filled to capacity in less than 24 hours and, given the response, will be offered again in the future.

Key Successes

There have been countless successes in 2016-17 ~ more than could ever be written in an annual report. This list provides some highlights as provided by multiple members of the SRMCS staff.

- Yet another year of very strong attendance!
- Healthy financial standing. Strong cash flow and solid fund balance.
- SRMCS received the greatest amount of monetary donations ever at over \$23,546.00!
- Continued employment of our Literacy Specialist to support identified students requiring additional academic help.
- Strong child/parent satisfaction as reported on the family survey.
- Updated multiple student safety security features including installing additional external video surveillance cameras and a school-wide paging system.
- Enhanced our natural play space by adding a “car pit,” quiet reading/reflection areas, etc.
- Hosting a school-wide service project with H2O for Life raising money for a school in Guatemala to have increased access to clean water and sanitation.
- SRMCS outperformed the state on all three MCA assessments – reading, math, and science.

Key Challenges & Addressing Those Challenges

Snow Fun!



Along with all the key successes, every school faces key challenges. The greatest of our challenges are listed below:

- Mandated testing vs. Montessori theory. Perhaps our biggest challenge is reporting specific, mandatory data while trying to remain as authentic of a Montessori school as we can. Montessori is not a strong advocate of standardized testing, yet we are required to use them.

Our teachers continually struggle with balancing our teaching methods with state requirements.

- Mandated Lottery System for Enrollment. Each year we have a handful of students who are enrolled in the Children’s House Program (preschool), but do not receive any type of preference for enrollment into the charter school. This leads to many disappointed families who wish to continue with Montessori education but cannot because their child’s name did not get pulled in the annual lottery. It is very unfortunate how many wonderful families we lose due to the lottery.
- Quantifying subjective growth. The third program challenge we face is that many of the skills we teach are difficult to measure. A Montessori education builds independence and self-reliance in children. Our students also develop time management and leadership skills. They are given numerous opportunities to work cooperatively in groups. All of these skills are necessary for success, but may not be reflected in test scores. In an effort to monitor and measure these skills, lead teachers use a school-created student growth assessment based on the four planes of Child Development according to Dr. Maria Montessori. Categories include normalization, social/emotional wellbeing, independence and community engagement. This is completed by the lead general education teacher annually in the fall and spring in an effort to quantify subjective growth over a school year. However, most importantly, the results are used to ensure that students are meeting developmental milestones as they age and supports our desire to teach to the *whole* child ~ body, mind and spirit.



Angela, 5th grade, presents a traditional Mexican dance in her very own dress. Beautiful!

Academic Performance: Goals & Benchmarks

Progress on ACNW Contractual, Academic & WBWF Alignment

The following are contracted goals agreed upon between Swan River Montessori Charter School and its authorizer, Audubon Center of the North Woods. The purpose of these goals is to ensure that students are making adequate academic progress year after year in the eyes of all constituencies – the SRMCS Board of Directors, the authorizer, and the State of Minnesota. Each is categorized under one of the five World Best Workforce goal areas:

1. Ready for Kindergarten [R4K]: All students are ready for kindergarten.
2. Reading Well by 3rd Grade [RG3]: All students in third grade achieve grade-level literacy.
3. Achievement Gap Closure [AGC]: All racial and economic achievement gaps between students are closed.
4. Career and College Readiness [CCR]: All students are career- and college- ready before graduating from high school.
5. Graduate from High School [GRAD]: All students graduate from high school. ****Note:** this goal area is not included in this report as SRMCS does not serve students past 6th grade.

Indicator 1: Mission-Related Outcomes

| School Goal: <i>Over the period of the contract, students at Swan River Montessori Charter School (SRMCS) will demonstrate growth in four child development categories (normalization, independence, social/emotional wellbeing & community engagement) according to the Montessori Planes of Development as measured by a locally-developed assessment rubric.</i> | | | |
|--|--|-------------------------------|------|
| Performance Ratings | ACNW/SRMCS Mission-Related Goal: In FY17, the aggregate score for all students in grades K-6 will be equal to or greater than 12 points (out of 16) as measured by the locally-developed assessment rubric administered annually in the spring. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate score is equal to or greater than 14 points. | | |
| Meets Target (x1.0) | The aggregate score is equal to or greater than 12 points. | x | 12.2 |
| Approaches Target (x0.5) | The aggregate score is greater than 8 points. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |

As the results show, students did well and met the goal stated above. After reviewing the specific data, we quickly noticed that there may be some discrepancies with how teachers were rating students in each category. This is largely due to the ratings being so subjective. Teachers will meet at the beginning of the FY18 school year to discuss how each interpreted the categories

and the criteria that was used. Our goal will be to better align the teachers with each other, particularly within departments (CH, E1 and E2), so results are determined more systematically.

Indicator 2: English Language Learners

The school does not have a contractual goal in this indicator area because SRMCS has no English Language Learners currently enrolled.

Indicator 3: Reading Growth

| School Goal: <i>Over the period of the contract, students at SRMCS will demonstrate growth in reading as measured by state accountability tests.</i> | | | |
|---|--|-------------------------------|--------|
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 2: In FY17, the aggregate growth z-score for all students on state accountability tests will be equal to or greater than 0.00. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate growth z-score is equal to or greater than 0.50 | | |
| Meets Target (x1.0) | The aggregate growth z-score is equal to or greater than 0.00. | x | 0.1033 |
| Approaches Target (x0.5) | The aggregate growth z-score is greater than -0.50. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 2: In FY17, the aggregate percentage of students that achieve a positive z-score on state accountability tests will be greater than 50.0%. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate percentage is at least 60.0%. | | |
| Meets Target (x1.0) | The aggregate percentage is greater than 50.0%. | x | 52.8% |
| Approaches Target (x0.5) | The aggregate percentage is at least 40.0%. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |

Indicator 4: Math Growth

| School Goal: <i>Over the period of the contract, students at SRMCS will demonstrate growth in math as measured by state accountability tests.</i> | | | |
|--|--|-------------------------------|--------|
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 1: In FY17, the aggregate growth z-score for all students on state accountability tests will be equal to or greater than 0.00. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate growth z-score is equal to or greater than 0.50 | | |
| Meets Target (x1.0) | The aggregate growth z-score is equal to or greater than 0.00. | x | 0.1966 |
| Approaches Target (x0.5) | The aggregate growth z-score is greater than -0.50. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 2: In FY17, the aggregate percentage of students that achieve a positive z-score on state accountability tests will be greater than 50.0%. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate percentage is at least 60.0%. | x | 67.9% |
| Meets Target (x1.0) | The aggregate percentage is greater than 50.0%. | | |
| Approaches Target (x0.5) | The aggregate percentage is at least 40.0%. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |

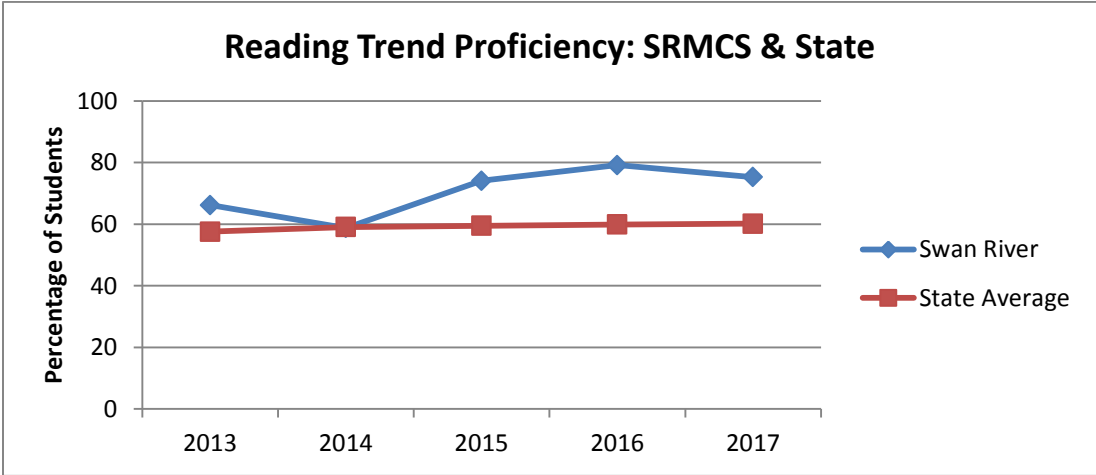
Indicator 5: Reading Proficiency

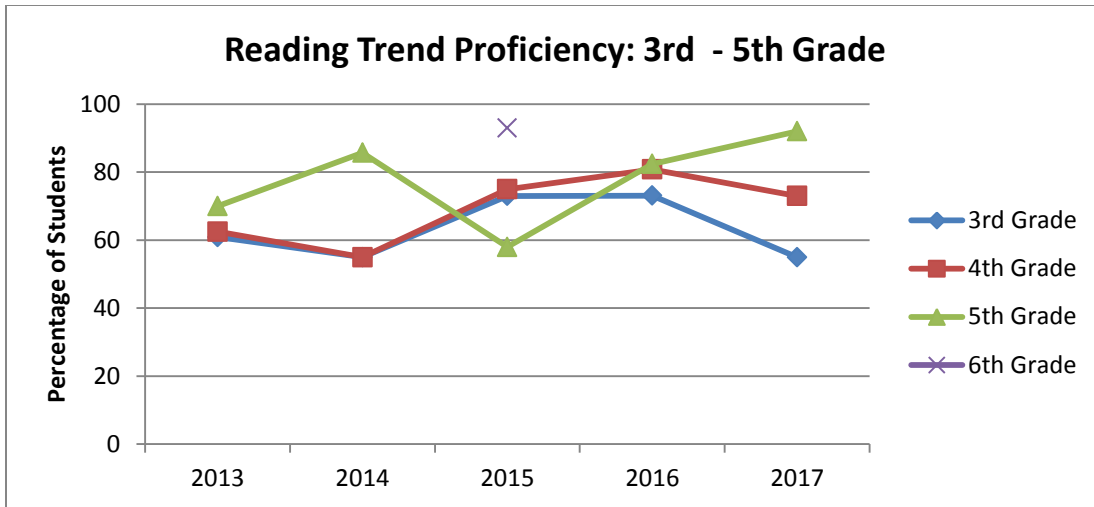
| School Goal: <i>Over the period of the contract, students at SRMCS will demonstrate proficiency in reading as measured by state accountability tests and nationally normed assessments.</i> | | | |
|--|---|-------------------------------|--|
| Performance Ratings | WBWF Reading Well by 3rd Grade [RG3] Goal 1: In FY17, the school's (SR) aggregate proficiency index score for students in <u>grade 3</u> will increase by at least 3.0 points from the baseline (BL) proficiency index score (FY13-15 baseline – 72.9) OR will be greater than that of the state (MN) for the same grade (3). | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 8.0 points greater than the baseline score OR is at least 8.0 points above the state's score. | | |
| Meets Target (x1.0) | The school's aggregate proficiency index score is at least 3.0 points greater than the baseline score OR is greater than the state's score. | | |

| | | | |
|------------------------------------|---|-------------------------------|-----------------------------------|
| Approaches Target (x0.5) | The school's aggregate proficiency index score is at least equal to the baseline score OR is within 5.0 points of the state's score. | X | SR=55.0% BL=72.9% MN=56.8% |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Reading Well by 3rd Grade [RG3] Goal 2: In FY17, the school's aggregate proficiency index score for students in <u>grade 3</u> will be within 2.0 points of the resident district (ISD 882 – Monticello) for the same grade (3). | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 4.0 points above the resident district's score. | | |
| Meets Target (x1.0) | The school's aggregate proficiency index score is within 2.0 points of the resident district's score. | | |
| Approaches Target (x0.5) | The school's aggregate proficiency index score is within 8.0 points of the resident district's score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | X | SR=55.0% #882=65.1% |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 1: In FY17, the school's aggregate proficiency index score for students in <u>grades 4-5</u> will increase by at least 2.0 points from the baseline proficiency index score (FY13-15 baseline – 79.6) OR will be greater than that of the state for the same grades (4-5). **6 th grade is not included in this data as there were only 8 students total** | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 6.0 points greater than the baseline score OR is at least 6.0 points above the state's score. | X | SR=82.5% BL=79.6% MN=62.25% |
| Meets Target (x1.0) | The school's aggregate proficiency index score is at least 2.0 points greater than the baseline score OR is greater than the state's score. | | |
| Approaches Target (x0.5) | The school's aggregate proficiency index score is at least equal to the baseline score OR is within 5.0 points of the state's score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 2: In FY17, the school's aggregate proficiency index score for students in <u>grades 4-5</u> will be within 2.0 points of the resident district (ISD 882 – Monticello) for the same grades (4-5). **6 th grade is not included in this data as there were only 8 students total** | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 5.0 points above the resident district's score. | X | SR=82.5% #882=73.6% |
| Meets Target (x1.0) | The school's aggregate proficiency index score is within 2.0 points of the resident district's score. | | |

| | | | |
|------------------------------------|--|-------------------------------|------------------------|
| Approaches Target (x0.5) | The school's aggregate proficiency index score is within 8.0 points of the resident district's score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Achievement Gap Closure [AGC] Goal 1: In FY17, the school's aggregate proficiency index score for students in the Special Education subgroup will be greater than that of the state for the same subgroup and the same grades (3-6). | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 10.0 points above the state's score. | X | SR=73.7% MN=30.4% |
| Meets Target (x1.0) | The school's aggregate proficiency index score is greater than the state's score. | | |
| Approaches Target (x0.5) | The school's aggregate proficiency index score is within 5.0 points of the state's score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Achievement Gap Closure [AGC] Goal 2: In FY17, the school's aggregate proficiency index score for students in the Special Education subgroup will be within 2.0 points of the resident district (ISD 882 – Monticello) for the same subgroup and the same grades (3-6). | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 3.0 points above the resident district's score. | X | SR=73.7% #882=35.9% |
| Meets Target (x1.0) | The school's aggregate proficiency index score is within 2.0 points of the resident district's score. | | |
| Approaches Target (x0.5) | The school's aggregate proficiency index score is within 6.0 points of the resident district's score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 3: In FY17, the aggregate percentage of students in grades 1-6 who demonstrate "average," "above average," or "well above average" performance based on AIMS Web normed assessment scales for READING FLUENCY on the spring assessment will be at least 80% AND the aggregate percentage of students who demonstrate "above average" or "well above average" performance will be at least 25%. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate percentage of students who demonstrated "average," "above average," or "well above average" performance is at least 90% AND the aggregate percentage of students who demonstrated "above average" or "well above average" performance is at least 40%. | | |

| | | | |
|------------------------------------|--|-------------------------------|-----------------------------|
| Meets Target (x1.0) | The aggregate percentage of students who demonstrated “average,” “above average,” or “well above average” performance is at least 80% AND the aggregate percentage of students who demonstrated “above average” or “well above average” performance is at least 25%. | x | 81.3% (30.6% = AA & WAA) |
| Approaches Target (x0.5) | The aggregate percentage of students who demonstrated “average,” “above average,” or “well above average” performance is at least 70%. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 4: In FY17, the aggregate percentage of students in grades K-6 who meet or exceed grade level reading expectations based on Fountas & Pinnell Instructional Level Expectations for Reading in spring will be at least 80%. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate percentage is at least 90%. | | |
| Meets Target (x1.0) | The aggregate percentage is at least 80%. | | |
| Approaches Target (x0.5) | The aggregate percentage is at least 70%. | x | 77.8% |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |





Reading Data: Overall, Swan River’s MCA test scores for reading came in strong especially in comparison with the Minnesota state average. As the graph shows, 5th graders performed particularly well while our 3rd graders significantly struggled. To date, there is no specific reason the staff has identified as to why the scores dropped. These students have varied academic abilities, but no more than any other grade level. At this time, the decision is to continue as we have been, including the use of the strategies listed below. When FY18 results are available, our hope is to see better gains. If not, the staff will brainstorm different strategies to be put in place moving forward.

1. Daily additional paragraph editing work will be completed by every student on top of all other classroom work.
2. Additional reading homework will be sent home every Monday-Thursday.
3. Increased help offered to students during the day via the Classroom Assistant. Typical duties during the day have been slightly shifted to allow for more 1:1 time with students who need it.
4. Increase the use of adult volunteers to read with students both individually and in small groups.
5. Continue to employ a full-time Literacy Specialist, who is trained in the Sue Barton Reading Program, to work with our “at risk” students individually.

Indicator 6: Math Proficiency

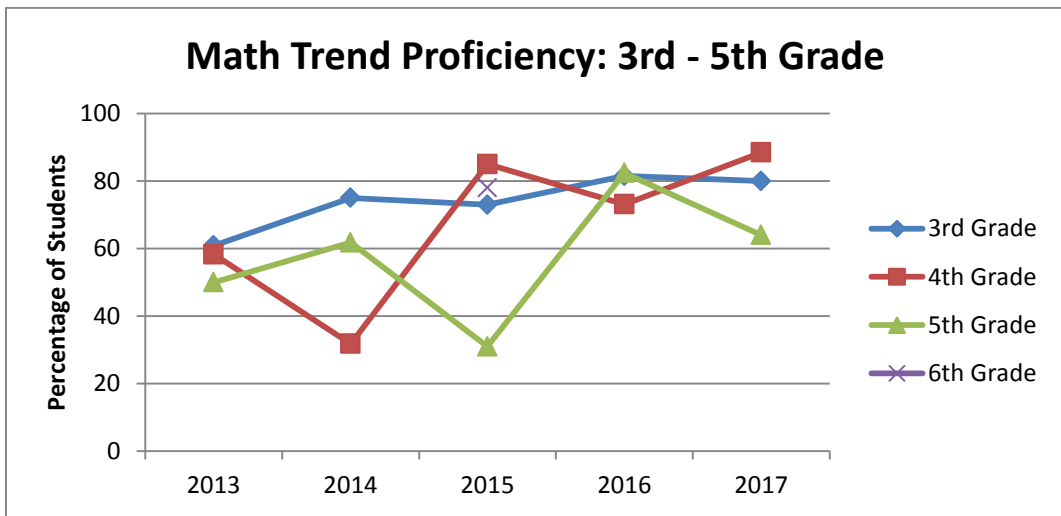
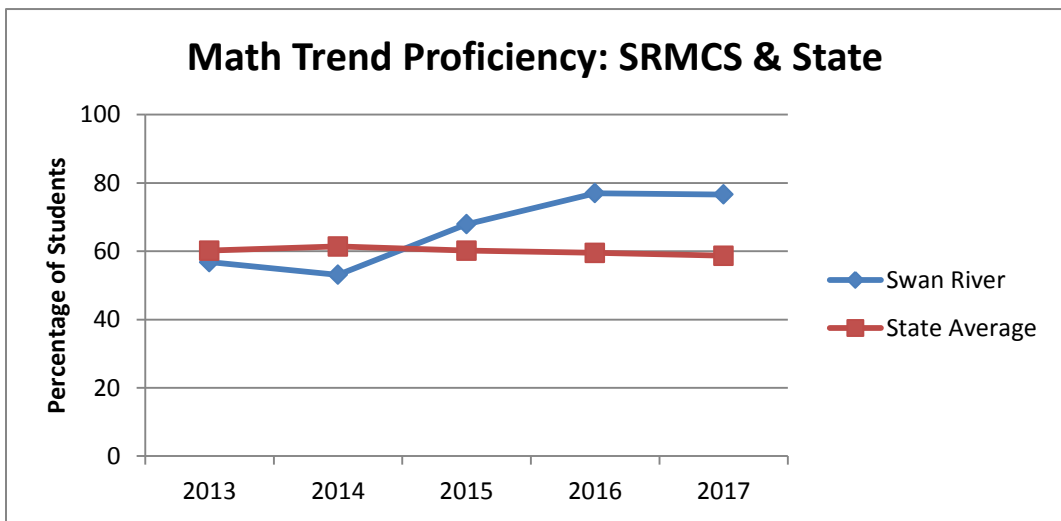
| | | |
|---|---|-------------------------------|
| School Goal: <i>Over the period of the contract, students at SRMCS will demonstrate proficiency in math as measured by state accountability tests and nationally normed assessments.</i> | | |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 1: In FY17, the school’s aggregate proficiency index score for students in grades 3-6 will increase by at least 3.0 points from the baseline proficiency index score (FY13-15 baseline – 70.4) OR will be greater than that of the state for the same grades (3-6). | Results for 2016-2017: |

| | | | |
|------------------------------------|---|-------------------------------|----------------------------------|
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 8.0 points greater than the baseline score OR is at least 8.0 points above the state's score. | x | SR=76.6% BL=70.4% MN=58.7% |
| Meets Target (x1.0) | The school's aggregate proficiency index score is at least 3.0 points greater than the baseline score OR is greater than the state's score. | | |
| Approaches Target (x0.5) | The school's aggregate proficiency index score is at least equal to the baseline score OR is within 5.0 points of the state's score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 2: In FY17, the school's aggregate proficiency index score for students in grades 3-6 will be within 2.0 points of the resident district (ISD 882 – Monticello) for the same grades (3-6). | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 5.0 points above the resident district's score. | x | SR=76.6% #882=58.7% |
| Meets Target (x1.0) | The school's aggregate proficiency index score is within 2.0 points of the resident district's score. | | |
| Approaches Target (x0.5) | The school's aggregate proficiency index score is within 8.0 points of the resident district's score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Achievement Gap Closure [AGC] Goal 1: In FY17, the school's aggregate proficiency index score for students in the Special Education subgroup will be greater than that of the state for the same subgroup and the same grades (3-6). | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 10.0 points above the state's score. | x | SR=63.2% MN=29.9 |
| Meets Target (x1.0) | The school's aggregate proficiency index score is greater than the state's score. | | |
| Approaches Target (x0.5) | The school's aggregate proficiency index score is within 5.0 points of the state's score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Achievement Gap Closure [AGC] Goal 2: In FY17, the school's aggregate proficiency index score for students in the Special Education subgroup will be within 2.0 points of the resident district (ISD 882 – Monticello) for the same subgroup and the same grades (3-6). | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school's aggregate proficiency index score is at least 3.0 points above the resident district's score. | x | SR=63.2% #882=38.2% |

| | | | |
|------------------------------------|---|-------------------------------|-----------------------------|
| Meets Target (x1.0) | The school's aggregate proficiency index score is within 2.0 points of the resident district's score. | | |
| Approaches Target (x0.5) | The school's aggregate proficiency index score is within 6.0 points of the resident district's score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 3: In FY17, the aggregate percentage of students in grades 2-6 who demonstrate "average," "above average," or "well above average" performance based on AIMS Web normed assessment scales for MATHEMATICAL CONCEPTS AND APPLICATIONS on the spring assessment will be at least 80% AND the aggregate percentage of students who demonstrate "above average" or "well above average" performance will be at least 25%. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate percentage of students who demonstrated "average," "above average," or "well above average" performance is at least 90% AND the aggregate percentage of students who demonstrated "above average" or "well above average" performance is at least 40%. | | |
| Meets Target (x1.0) | The aggregate percentage of students who demonstrated "average," "above average," or "well above average" performance is at least 80% AND the aggregate percentage of students who demonstrated "above average" or "well above average" performance is at least 25%. | X | 86.7% (32.0% = AA & WAA) |
| Approaches Target (x0.5) | The aggregate percentage of students who demonstrated "average," "above average," or "well above average" performance is at least 70%. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |

| | | | |
|------------------------------|---|-------------------------------|-----------------------------|
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 4: In FY17, the aggregate percentage of students in grades 1-6 who demonstrate "average," "above average," or "well above average" performance based on AIMS Web normed assessment scales for MATHEMATICAL COMPUTATION on the spring assessment will be at least 80% AND the aggregate percentage of students who demonstrate "above average" or "well above average" performance will be at least 25%. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate percentage of students who demonstrated "average," "above average," or "well above average" performance is at least 90% AND the aggregate percentage of students who demonstrated "above average" or "well above average" performance is at least 40%. | X | 96.1% (58.5% = AA & WAA) |

| | | | |
|--|--|--|--|
| Meets Target (x1.0) | The aggregate percentage of students who demonstrated “average,” “above average,” or “well above average” performance is at least 80% AND the aggregate percentage of students who demonstrated “above average” or “well above average” performance is at least 25%. | | |
| Approaches Target (x0.5) | The aggregate percentage of students who demonstrated “average,” “above average,” or “well above average” performance is at least 70%. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |



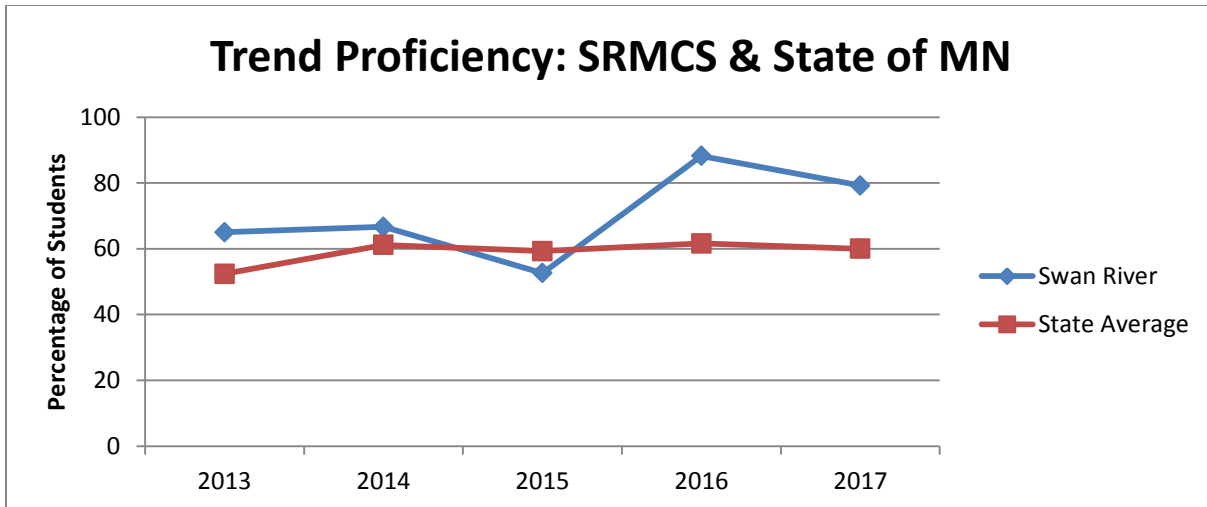
Math Data: Overall, MCA math results remained strong, including significant improvement in 4th grade. Though there was a decline among the 5th grade group from the 2016 score, it should be noted that their proficiency percentage was still 5.3% higher than the state average. The

teaching team still acknowledges room for improvement and, therefore, will continue to implement the following strategies for 2017-18:

1. Daily additional math problems, particularly word problems, are to be completed by every student on top of all other classroom work.
2. Additional math homework will be sent home every Monday-Thursday.
3. Increased use of AIMSweb assessments. In 2015, the Math Computation assessment was added to better monitor student progress. This continued in 2016-17.
4. Increased help offered to students during the day via the Classroom Assistant. Typical duties during the day have been slightly shifted to allow for more 1:1 time with students who need it.

Indicator 7: Science Proficiency & Growth

| School Goal: <i>Over the period of the contract, students at SRMCS will demonstrate proficiency in science as measured by state accountability tests.</i> | | | |
|--|---|-------------------------------|------------------------|
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 1: In FY17, the school’s aggregate proficiency index score for students in grade 5 will increase by at least 3.0 points from the baseline proficiency index score (FY13-15 baseline – 74.2) OR will be greater than that of the state for the same grade (5). | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school’s aggregate proficiency index score is at least 8.0 points greater than the baseline score OR is at least 8.0 points above the state’s score. | x | SR=80.0% MN=60.0% |
| Meets Target (x1.0) | The school’s aggregate proficiency index score is at least 3.0 points greater than the baseline score OR is greater than the state’s score. | | |
| Approaches Target (x0.5) | The school’s aggregate proficiency index score at least equal to the baseline score OR is within 5.0 points of the state’s score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 2: In FY17, the school’s aggregate proficiency index score for students in grade 5 will be within 2.0 points of the resident district (ISD 882 – Monticello) for the same grade (5). | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The school’s aggregate proficiency index score is at least 4.0 points above the resident district’s score. | | |
| Meets Target (x1.0) | The school’s aggregate proficiency index score is within 2.0 points of the resident district’s score. | x | SR=80.0% #882=77.5% |
| Approaches Target (x0.5) | The school’s aggregate proficiency index score is within 8.0 points of the resident district’s score. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |



Science Data: SRMCS is very proud of our 5th grade MCA science results! As noted on the graph above, our students scored 20% above the state average as well as 5.8% above our 2017 goal. Generally, Montessori is very strong in its science curriculum, specifically in physical and earth science, biology, and botany. The majority of our teachers are trained in Montessori S.T.E.M. (Science, Technology, Engineering and Mathematics). Our students have profoundly benefited from this additional teacher training in the classrooms not just regarding test scores, but, more importantly, for hands-on experiences not typically associated with the Montessori Method.

**Indicator 8a: Proficiency/Growth in Other Curricular Areas or Educational Programs:
Kindergarten Readiness**

| School Goal: <i>Over the period of the contract, preschool students enrolled at SRMCS will demonstrate readiness for kindergarten as measured by a locally-developed Kindergarten Readiness Checklist.</i> | | | |
|---|---|-------------------------------|-----|
| Performance Ratings | WBWF Ready for Kindergarten [R4K] Goal 1: In FY17, the aggregate percentage of students enrolled in preschool and entering kindergarten the next school year who meet or exceed kindergarten readiness standards as measured by the Kindergarten Readiness Checklist assessed annually in the spring will be at least 85%. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate percentage is at least 95%. | | |
| Meets Target (x1.0) | The aggregate percentage is at least 85%. | x | 89% |
| Approaches Target (x0.5) | The aggregate percentage is at least 80%. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |

This was the first time that SRMCS used the Kindergarten Readiness Checklist as an official means of assessment. Staff particularly liked its level of comprehensiveness - it not only hones in on academic ability but also focuses on executive functioning and life skills which are equally as important. We also found it interesting that when this goal was created, there was a strong assumption that our students would exceed most, if not all, checklist categories. The staff was surprised that this wasn't necessarily the case. While the majority of students did very well, there were a small number of students "flagged" as having a deficit in one or more skill areas.

Unfortunately, by the time these results were compiled, students were done with the school year. The Children's House staff is now considering using this checklist at least twice during the school year – either in fall or winter and then again in the spring. This will allow time to analyze data, isolate deficiencies, and provide the necessary support well before summer begins. The goal, of course, is to increase kindergarten readiness in all categories with all children.

**Indicator 8b: Proficiency/Growth in Other Curricular Areas or Educational Programs:
Writing**

| School Goal: <i>Over the period of the contract, students at SRMCS will demonstrate growth in writing as measured by a locally-developed assessment rubric.</i> | | | |
|--|---|-------------------------------|-------|
| Performance Ratings | WBWF Career/College Readiness [CCR] Goal 1: In FY17, the aggregate percentage of students in grades 1-6 who increase (or maintain if above 90%) proficiency in writing skills from winter to spring as measured by the locally-developed assessment rubric will be at least 90%. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The aggregate percentage is at least 95%. | | |
| Meets Target (x1.0) | The aggregate percentage is at least 90%. | | |
| Approaches Target (x0.5) | The aggregate percentage is at least 80%. | x | 86.2% |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |

These are very interesting results. While our students did very well overall at 86.2%, this goal (a goal SRMCS wrote based on its own assessment rubric) was not met. Prior to completing the winter assessment in December 2017 (the first writing assessment of the year), staff will meet to discuss why 13.8% of students did not show improvement in FY17. Were expectations unrealistic? Were students unmotivated? Were there holes in the curriculum? Based on this discussion, the school may re-think this goal and our current means of meeting it.

Indicator 9: Post-Secondary Readiness

Being an elementary school, post-secondary education is years away for our students. However, any educator would agree that the foundation for all learning and, therefore, post-secondary readiness begins in the home from birth and continues later with preschool programs and elementary schools. Swan River readies its students by creating a love for learning, by focusing on critical-thinking skills versus just the memorization of facts, and supporting the WHOLE child in his/her educational experience, including social, emotional, and physical growth.

Indicator 10: Attendance

| School Goal: <i>Over the period of the contract, students at SRMCS will attend the school at high rates.</i> | | | |
|---|--|-------------------------------|--------|
| Performance Ratings | ACNW/SRMCS Goal: In FY17, the average of the school’s annual attendance rates will be at least 90.0%. | Results for 2016-2017: | |
| Exceeds Target (x1.5) | The average of the school’s annual attendance rates is at least 95.0%. | x | 95.84% |
| Meets Target (x1.0) | The average of the school’s annual attendance rates is at least 90.0%. | | |
| Approaches Target (x0.5) | The average of the school’s annual attendance rates is at least 85.0%. | | |
| Does Not Meet Target (x0.0) | The school did not meet the criteria for any of the ratings above. | | |

SRMCS has always been fortunate to not only have low turnover with students and staff, but also have excellent attendance rates each year. The population we serve is typically non-transient and while there have been a small number of families struggling with tardiness, overall, students are in school every day.

Federal & State Accountability: World’s Best Workforce

| | | | | | |
|---|-------|-------|-------|-------|--------------|
| “On Track for Success” MATH | 2013 | 2014 | 2015 | 2016 | 2017 |
| OVERALL | 54.2% | 48.9% | 58.8% | 68.1% | 68.6% |
| High Growth | 43.8% | 25.6% | 41.2% | 34.1% | 51.0% |
| Medium Growth | 33.4% | 39.5% | 37.3% | 38.6% | 35.3% |
| Low Growth | 22.9% | 34.9% | 21.6% | 27.3% | 13.7% |
| “On Track for Success” READING | 2013 | 2014 | 2015 | 2016 | 2017 |
| OVERALL | 63.2% | 46.8% | 65.5% | 76.8% | 74.0% |
| High Growth | 18.3% | 28.8% | 42.3% | 51.2% | 36.0% |
| Medium Growth | 51.0% | 25.5% | 34.6% | 30.2% | 48.0% |
| Low Growth | 30.6% | 44.7% | 23.1% | 18.6% | 16.0% |

| Proficiency Rates in Percentages: MATH | | | | | | |
|--|-----------------------|-------------|----------------|---------------------------|----------------------------|----------------------|
| | Swan River Montessori | State of MN | Local District | World Learners Montessori | New Discoveries Montessori | Bluffview Montessori |
| 2013 | 56.8 | 60.2 | 72.5 | 62.9 | 29.5 | 59.4 |
| 2014 | 53.1 | 61.4 | 74.4 | 54.1 | 42.2 | 63.3 |
| 2015 | 67.9 | 60.2 | 73.6 | 50.0 | 48.3 | 47.9 |
| 2016 | 77.0 | 59.5 | 72.8 | 55.6 | 46.9 | 61.5 |
| 2017 | 76.6 | 58.7 | 72.9 | 47.5 | 39.3 | 59.1 |

| Proficiency Rates in Percentages: READING | | | | | | |
|---|-----------------------|-------------|----------------|---------------------------|----------------------------|----------------------|
| | Swan River Montessori | State of MN | Local District | World Learners Montessori | New Discoveries Montessori | Bluffview Montessori |
| 2013 | 66.2 | 57.6 | 66.1 | 68.4 | 43.2 | 69.2 |
| 2014 | 58.8 | 59.1 | 64.2 | 66.5 | 56.6 | 65.6 |
| 2015 | 74.1 | 59.5 | 68.1 | 66.4 | 65.9 | 60.5 |
| 2016 | 79.2 | 59.9 | 67.5 | 71.0 | 58.2 | 67.2 |
| 2017 | 75.3 | 60.2 | 70.8 | 71.3 | 52.4 | 67.2 |

| Proficiency Rates in Percentages: SCIENCE (5 th Grade Only) | | | | | | |
|--|-----------------------|-------------|----------------|---------------------------|----------------------------|----------------------|
| | Swan River Montessori | State of MN | Local District | World Learners Montessori | New Discoveries Montessori | Bluffview Montessori |
| 2013 | 65.0 | 52.4 | 65.9 | 63.0 | 40.9 | 45.5 |
| 2014 | 66.7 | 61.2 | 63.0 | 59.2 | 50.0 | 61.1 |
| 2015 | 52.6 | 59.3 | 64.2 | 58.9 | 43.5 | 59.5 |
| 2016 | 88.2 | 61.6 | 65.9 | 61.4 | 42.3 | 64.0 |
| 2017 | 80.0 | 60.0 | 77.5 | 57.9 | 75.0 | 47.8 |

Additional World's Best Workforce Data

Progress toward “Reading Well by 3rd Grade”

As with all schools, one of our top priorities is to ensure that all children have a strong foundation in reading, particularly by the time they reach upper elementary. As stated throughout this report, SRMCS implements a wide variety of differentiated instruction and support for each child enrolled. The staff is well trained, especially in Response to Intervention (RTI), in identifying areas of strengths and weaknesses as a student ages and develops. We understand that early intervention is key to the long term success for every child.

How do we support our students so they are reading well by 3rd grade?

1. Employment of a Literacy Specialist to work individually with students deemed at risk
2. Providing a classroom assistant in each general education classroom to provide more 1:1 and small group attention
3. Modifying classroom curriculum and instruction as necessary
4. Regular teacher meetings focusing on instructional improvement
5. Encouraging parent involvement in each child's progress

6. Consistent use of assessments to monitor growth
7. Increasing professional knowledge via continuing education opportunities

Equitable Teacher Distribution

One of Swan River's greatest strengths is equal access highly educated, experienced teachers. Not only do all of our teachers hold a valid teaching license in the State of Minnesota, our school requires that each general education teacher be Montessori trained in the level s/he teaches. Depending on the ages/grades of the students being taught, each lead teacher must hold the equivalent Montessori certification - a minimum of 1-2 years of additional coursework beyond what is required for standard teacher licensure. Therefore, every child enrolled at SRMCS will receive a comparable education from a teacher with a Bachelor's Degree, valid licensure, and Montessori certification.



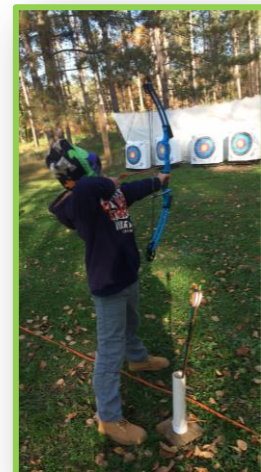
Access to Diverse Teachers

Being a small charter school located in greater Minnesota, access to diverse teachers can be a challenge. However, given the school's student population and the population of the local and surrounding communities, the percentages relating to diversity are quite proportionate. Should the school need to hire new employees, access to diverse teachers is taken into consideration.

Closing the Achievement Gap

Response to Intervention: In an a continued effort to help all of our students become proficient, a large majority of our staff members (teachers, classroom assistants, and program paraprofessionals) have received training in RTI aka Response to Intervention. RTI is a multi-tier approach to the early identification and support of students with learning needs. Every fall, all SRMCS students kindergarten-6th grade are screened using standardized assessments: Fountas & Pinnell for reading comprehension and Aims Web for reading fluency/accuracy, math concepts/applications, and mathematical computation. Struggling students are provided with various types of interventions to accelerate their rate of learning. These services are provided by a number of school personnel including general education teachers, classroom assistants, and specialists.

Literacy Specialist: As part of our RTI implementation, SRMCS employs a part-time Literacy Specialist, Julie Halvorson, to work individually with students who have been "flagged" or deemed "at risk" in a specific academic area, particularly reading. This is determined primarily by teacher observations, Aims Web and Fountas & Pinnell assessment scores, and via the Child Find Team.



Word Twister!



At any given time Ms. Halvorson had 7-8 students on her case load depending on the individual level of need. Specifically in 2016-2017, Ms. Halvorson worked with seven students over the course of the year who met with her 3-4 times per week for approximately 20-30 minutes. These students showed significant improvement over the course of the year and will continue to work with Ms. Halvorson in the fall of 2017. After progress monitoring/assessments are completed in September, the Child Study Team will meet to determine who is ready to graduate from the program as well as identify new students may qualify for these services moving forward.

We believe that this is excellent progress toward closing the gap. Not only did seven students receive additional help, most made incredible gains and are now back, or getting back, on track with same-grade peers without any additional referrals.

Progress toward Ensuring Kindergarten Readiness

Kindergarten Readiness Checklist: As part of Swan River's contract renewal process with ACNW in 2016, new and improved goals were formulated to better monitor student progress, including kindergarten readiness. In an effort to quantify readiness data, a teacher-developed Kindergarten Readiness Checklist was created. Skill categories include social, motor, writing, creative arts & music, math, science, self-help and so forth. The total score is then inputted into a scale determining if a child is exceeding, meeting, approaching, or not meeting kindergarten readiness standards. In addition to this checklist, teacher observation and parent input is also taken into consideration to ensure the decision to enroll in kindergarten is thorough and comprehensive.

Alignment with MN Early Childhood Learning Standards (ECLS): As discussed previously, SRMCS recognizes the importance of state academic standards and has worked hard aligning said standards with Montessori curriculum. This alignment was completed in FY16 and FY17 by our lead Children's House teachers and continues to be monitored in the event that standards evolve over time.



Glub...glub...we love to swim!

Educational Effectiveness: Assessment and Evaluation

Specific Areas of Need Identified & the Data the Needs Were Based Upon: Montessori Planes of Development – Student Growth Assessment

As has been stated throughout this report, Montessori education focuses on the whole child ~ body, mind and spirit. Over the years, the staff of SRMCS has used a multitude of tools to attempt to quantify data pertaining to social/emotional growth. For many years, we used a survey that students would complete themselves with the guidance of the classroom teacher. Students would indicate along a line spectrum their feelings about a variety of topics such as “I feel safe at school,” “I feel I can ask for help when I need it,” and so forth. While this data was interesting and useful to a point, it did not dig deep enough into the true well-being and development of the child. We also found that many children found it difficult to answer these questions as many were abstract and required the ability to self-reflect, an often challenging skill. In 2016-17, staff worked together to create what we call a Student Growth Assessment which is based on the four Montessori Planes of Development. These categories include:

1. Normalization - Demonstrates a love of work & age-appropriate concentration, self-discipline & sociability.
2. Social/Emotional Well-being - Manages emotions, creates and sustains positive peer relationships, demonstrates empathy, has positive self-esteem & has an overall positive outlook on life.
3. Independence - Demonstrates individuation, autonomy & self-regulation skills.
4. Community Engagement - Actively participates with classroom community, works in partnerships with peers, demonstrates effective communication and decision-making skills.

These categories are rated on a scale of 1-4 by the lead teachers both in the fall and again in the spring. We then track growth over time. This data has become far more valuable as the child ages and matriculates. It has also done wonders educating parents about Montessori philosophy as it relates to child development.

Assessment and Evaluation of Student Academic Progress

Montessori education recognizes that tests represent only a small portion of what a child truly knows. Instead, teachers rely largely on student work and in-class observations to assess his/her students. It is very common (and encouraged) for a Montessori teacher to take time out of his/her day to sit quietly and observe the classroom community. The purpose of this is to monitor students while they use the materials, taking note if the child is showing mastery and is ready to move forward, needs more time with a particular material, or needs a refresher/repeat lesson.

Observations also allow the teacher to see if movement in the room is purposeful, if partnered students are working well together, if students are making appropriate work choices, and to ensure work time is being used effectively.

As mandated by the State of Minnesota, all students 3rd through 6th grade participate in MCA testing annually each spring. SRMCS also utilizes Aims Web and Fountas & Pinnell to assess for reading comprehension, fluency, computation, and mathematical concepts. This is done three times per year in fall, winter, and spring. Some teachers, particularly in special education, also utilize the Read Naturally Reading Program to conduct additional informal progress monitoring.

The School Process for Disaggregating Data by Student Group

SRMCS uses the same process to disaggregate data by group as the state does. If a student group has 20 or more students, data is collected and reported. If a student group has 10- 20 students, data is collected, but not necessarily reported beyond SRMCS stakeholders. If a group has less than 10 students, data is collected, but not reported in any way beyond the staff of SRMCS.

Per the Department of Education and state of Minnesota, the only reportable student group is our special education population. There is no other disaggregated group that meets the 20+ student minimum requirement.

The School Process to Review & Evaluate the Effectiveness of Instruction & Curriculum

Beyond formal assessments, the staff of SRMCS is very diligent about creating, progressing, and reporting on the growth of the WHOLE child – cognitive, social/emotional, and physical. While we do not use a standard grading system as most traditional schools use, we do complete progress reports multiple times per year. We also meet on an ongoing basis regarding school-wide goals, assessment outcomes, and the strengths/weaknesses of the curriculum and instruction we provide.

The general process to review and evaluate instructional and curriculum effectiveness is as follows:

1. Meeting is called with all lead teaching staff members and administration.
2. An area or skill is isolated for discussion and review.
3. If the curriculum receives positive feedback, we continue its usage.
4. If the curriculum receives poor feedback:
 - a. Discussion is held as to why it was ineffective.
 - b. Curriculum/instructional gaps are identified.
 - c. The group brainstorms alternative options.
 - d. Specific individuals are charged with continued research of selected alternatives.
 - e. Individuals then report their findings to the lead teacher group.
 - f. A decision is made to either begin the new curriculum or if further research must



Some E-2 students gaze across the Mississippi River as part of the Big Journey Ferry Boat Excursion taken in the fall.

be conducted.

5. A minimum of one follow up meeting is held to determine progress.

Strategies for Improving Instruction, Curriculum & Student Achievement



School-made applesauce!

The Montessori Method: The beauty of a Montessori education is that modification and individualization are a natural occurrence in every child’s learning journey. If a child is struggling with a certain concept or skill, there are a number of ways the teacher can modify the material to better suit that child’s style of learning. Sometimes just changing the material used in class leads to it “clicking” with the student. In addition, with the child and teacher being together for three full years, the adults understand what a particular child may or may not need to succeed. There is an incredible amount of freedom to alter the curriculum and instruction as necessary to support student achievement in all areas of development.

Professional Development: The SRMCS Board of Directors guarantees a minimum of 16 continuing education hours/credits are offered on site throughout the school year. All professional development offered focuses increasing our knowledge and improving our practices. Some of these CEU sessions include:

- Positive Schoolwide Climate & Culture with Chris Hagedorn, Culture Piece, Inc.
- The Zones of Regulation: Program Implementation in a School Setting with Ashlee Fultz, COTA/L and Sue Jaeger, Speech Pathologist
- Writing with Excellence: Implementation for Standardized Matriculation
- Infant, Child & Adult CPR & First Aid with Luzette Wassen, Heart Vital CPR

School Director Performance Evaluation: The School Director is evaluated by each member of the Board of Directors annually per the School Director Performance Evaluation Policy (see attachment 2). To assist them with this task, all employees are given the opportunity to submit a survey on the School Director’s performance to the board. This feedback is taken into consideration when completing their comprehensive evaluation. Board members are also asked to site three areas of strength and three areas for improvement/development. Should something need to be directly addressed, the evaluation does include an area to detail an action plan.

Once evaluations are completed by each member, the data is compiled. The Board of Directors then hold a closed session at a board meeting to review the data and discuss any further action, if necessary.

Employee Performance Evaluations: Every SRMCS employee is given a formal job performance evaluation, inclusive of at least one classroom observation, annually by the School Director. Once completed, a 1:1 meeting is held, the evaluation and observation are reviewed, and any questions, concerns, strengths, and areas of improvement are discussed. All evaluations are kept in the employee’s file.

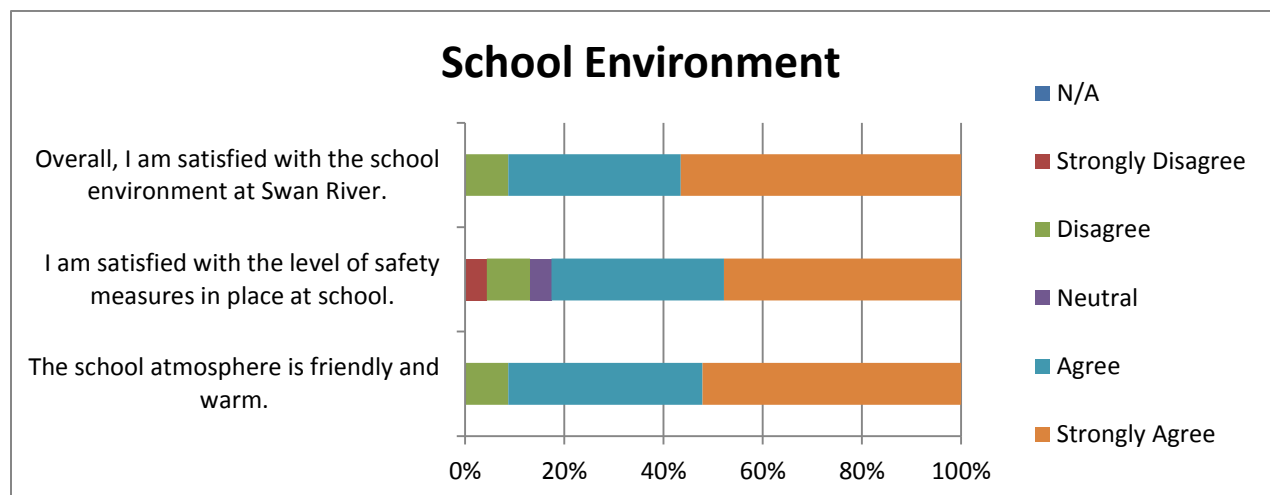
Education Effectiveness Practices

As stated previously, the staff of SRMCS is dedicated to providing a high-quality Montessori education to every student every day. We are always looking to improve our means of instruction while staying as authentic to the Montessori philosophy as we can. There are a number of ways we measure the educational effectiveness on an ongoing basis:

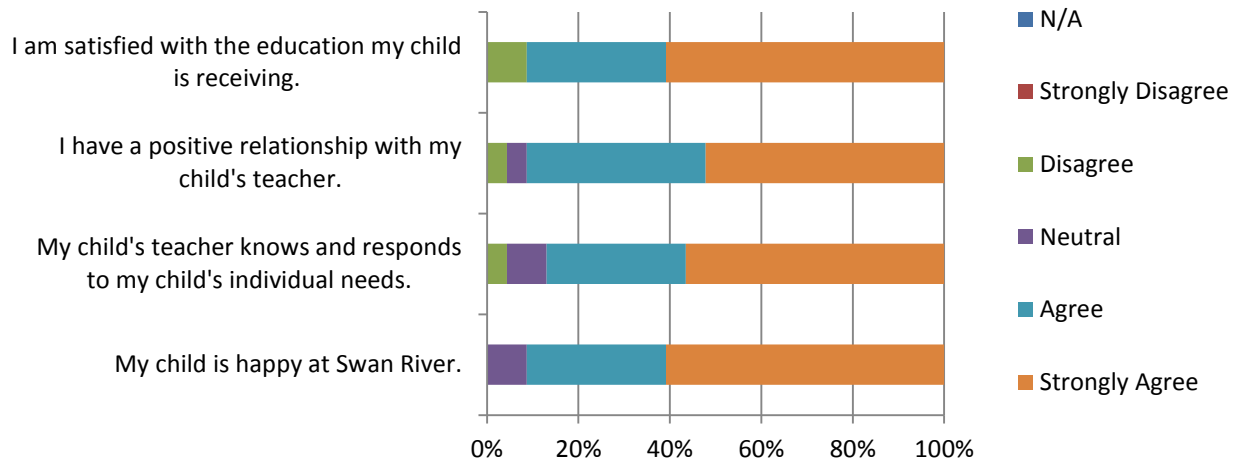
- Regularly held teacher meetings reviewing current curriculum.
- Ongoing research by teachers on potential new types of curriculum to implement.
- Provision of a minimum of 16 continuing education hours for all staff annually.
- Potential monetary support for staff to attend external workshops/conferences/seminars.
- Staying updated on school law, academic standards, and aligning the Montessori sequence of curriculum to those standards.
- Integration of educational technology, when appropriate.
- Annual performance evaluation of all staff members.
- Annual peer observation of all lead teachers.
- Weekly student observations by lead classroom teacher.
- Regular grade level team meetings.
- Expecting high standards of conduct for all students and employees as stated in the Student/Parent Handbook and Employee Handbook.

Parent & Student Satisfaction

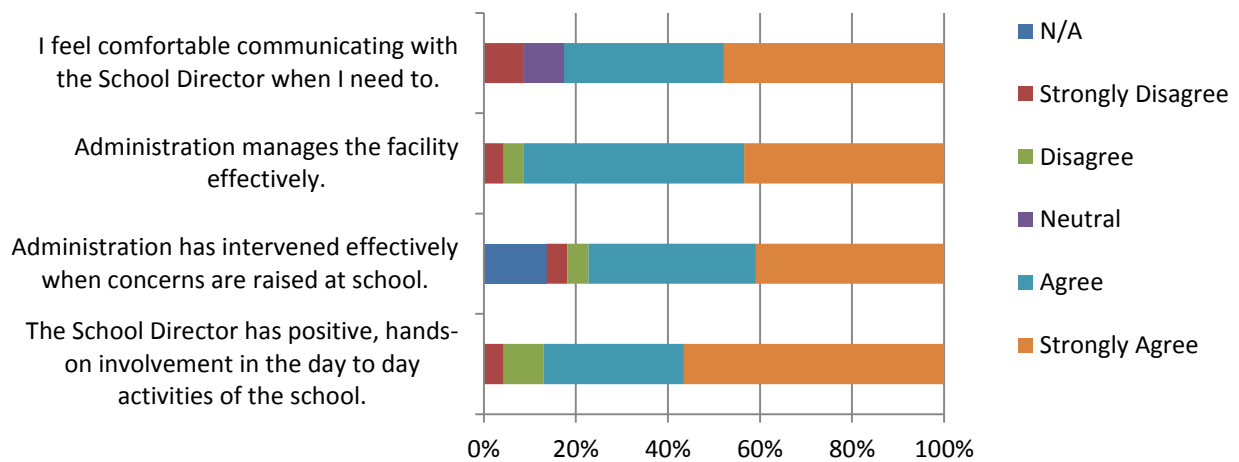
The charts below represent key data points that best represent the level of satisfaction felt by SRMCS families. As you will see, from the number of parents who completed the Family Survey in spring of 2017, high percentages prove a strong sense of overall satisfaction. This can be said not only about Swan River in general, but also specifically relating to such areas as child safety and happiness, administrative effectiveness, and the Montessori approach to education.



Montessori & The Classroom



Administration & the School Board



Environmental Education Implementation & Evaluation Plan



The mission of Swan River Montessori Charter School's authorizer, the Audubon Center of the North Woods, is to "instill a connection and commitment to the environment in people of all communities through experiential learning."

The Audubon Center of the North Woods defines environmental education as the implementation of values and strategies that foster learning and create environmentally literate citizens who engage in creating healthy outcomes for individuals,

communities, and the Earth. The overarching goal of environmental education is an environmentally literate citizenry. The test of environmental literacy is the capacity of an individual to work individually and collectively toward sustaining a healthy natural environment. This requires sufficient awareness, knowledge, skills, and attitudes in order to create a healthy planet where all people live in balance with the Earth.

As part of our contract with our authorizer, Audubon Center of the North Woods, we have agreed to the following environmental education goal:

“Staff, students and parents at Swan River Montessori Charter School will increase their environmental literacy, and develop the knowledge, skills, and attitudes to support a sustainable, healthy environment.”

Our Approach to Environmental Education

Environmental education is a core component in Montessori education. Though called “care of the environment” in Montessori terminology, its essence is very similar. Over the years, SRMCS has worked diligently trying to improve our EE efforts, particularly focusing on the choices we make every day and how those choices impact our world over time. After much reflection, and conducive to what Montessori philosophy states, we have found that student engagement, or “buy in,” is by far the most significant factor when encouraging children to make a true commitment to living in balance with the Earth. This is a momentous responsibility requiring long-term dedication.



Therefore, the following are the primary principles adopted and practiced by SRMCS promoting student engagement with the intent of instilling a life-long commitment to living in harmony with the environment:

1. Use of local surroundings. Our staff ensures that students are exposed to the outdoor environment frequently during the school day making learning immediate and meaningful. Looking at nature from a window or in a picture is not nearly as affective as physically being surrounded by it.
2. Provision of hands-on experiences. Students are encouraged as much as possible to use scientific tools such as binoculars, magnifying glasses, and journals to observe and manipulate nature up close and first-hand.
3. Implementation of cross-subject instruction. Environmental education goes far beyond the single subject of science. Montessori education does a wonderful job integrating EE/science topics across many subject areas, particularly in language/writing, history, cultural studies, and art. This is done all the time in our classrooms.

4. Focusing on topics based on real-time events and issues. We have found that our students are far more likely to actively engage when an issue is affecting the world here and now. The younger students often struggle with understanding abstract timelines so providing information in real-time has equated to greater interest.
5. Promotion and implementation of an all-school service project. In FY17, all students participated in a service project with the H2O for Life Organization raising money for a school in Guatemala to have better access to drinkable water and improve their sanitation system. This made an inspiring impact on our students and staff. It was wonderful to see students of all ages and grades eagerly participate and feel good about themselves, about each other, and for those in a distant country. It is this exact type of engagement that is unforgettable and, therefore, ever-lasting. SRMCS will continue to do similar all-school service projects annually.

The Environmental Literacy of Our Students: Data Collection & Analyzation

Per our renewed 5-year contract with ACNW, Swan River is required to submit annually in August an environmental education plan specifying goals relating to each of the five areas of environmental literacy - awareness, knowledge, attitude, skills, and action. The staff works collaboratively throughout the year to implement specific activities and then collect relevant data based on said goals. Upon conclusion of the school year, all data is compiled, analyzed, and reported to ACNW and the Board of Directors. ACNW then formally evaluates the school's progress on each literacy category sharing the results with school administration and the Board of Directors. Over the summer months, the School Director meets with the EE teacher to create a new plan for the new school year and the cycle repeats itself. This plan has been very effective in upholding our commitment to environmental education as well as keeping SRMCS accountable for meeting its objectives each year.

Environmental Education Successes & Challenges of the School Year

Successes:

- The creation of an EE plan in conjunction with ACNW that helps stay on course improving our overall EE efforts. Specifically, this plan ensure that we are executing and tracking specific EE literacy data with students.
- Planning and executing our first school-wide service project with the H2O for Life Organization. Our goal was to raise \$860 for a school in Guatamala to gain access to clean water and working sanitation systems. Our students smashed this goal raising over \$1,200!
- Making progress on our natural playground initiative getting our students back to playing with nature using pure imagination.
- A school board that continues to support the employment of an EE teacher.



Student volunteers work over the weekend to build a "car pit" for the natural playground.

- Staff who believes in the importance of EE and models this daily for our students.
- Involving our parents as volunteers to further our EE efforts.
- Receiving donations from our families and the PTO to support EE efforts.
- Having an active EE committee that meets at least monthly to keep the school progressing with EE goals.
- Having the support of ACNW with their mini grants to aid us with costs for EE implementation.

Challenges:

- After completing our first EE plan based on the new ACNW plan format, we created some goals that may have been too abstract for some of our students to meet. Others may have been too complex. After this trial year, we feel we have a better grasp of student capabilities and how to create more concrete goals that are reasonable yet challenging.
- Finding ways to educate/train our staff to further our EE efforts.
- Trying to be innovative on a continuing basis.

Application of Environmental Education Values & Strategies

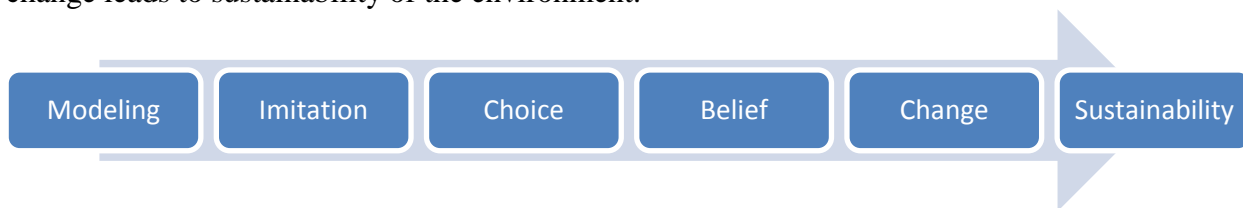


The care of plants is a valuable lesson in a Montessori environment. Students are responsible for dusting, watering, and providing sunlight to their plants routinely.

Environmental education is far greater than students participating in activities outdoors. While it has taken some time, our staff has come to realize that to make a true impact on our students and on the earth, we must go back to our roots. Montessori education teaches to the whole child – body, mind and spirit. Environmental education should be no different in that it, too, requires a holistic

approach. Given the age of our students (3 through 12) it is largely the responsibility of adults to guide the child with moral and ethical development. It is during this stage that children are beginning to develop reasoning skills and formulate belief systems.

Knowing this, we must take advantage of this window by providing positive influence and by modeling appropriate behavior/choices each and every day. Children typically follow the lead of the adults they are surrounded by. If the adults recycle, the children will recycle. If the adults turn off the water while adding soap to our hands, the children will turn the water off. If adults spontaneously pick up litter, they will, too. This modeling leads to imitation. Imitation leads to formation of choice. Choice leads to moral and ethical belief. Belief leads to true change. True change leads to sustainability of the environment.



Governance and Management

2016-2017 SRMCS Board of Directors

| MEMBER NAME | BOARD POSITION | AFFILIATION | DATE ELECTED | DATE SEATED | TERM END DATE | PHONE NUMBER | EMAIL ADDRESS |
|------------------|----------------|------------------|--------------|-------------|---------------|--------------|--|
| Stacie Woods | Chair | Community Member | 03/2006 | 03/2006 | 06/2018 | 763-295-8565 | Woods.monticello@yahoo.com |
| Josetta Zetah | Treasurer | Parent | 07/2009 | 07/2009 | 04/2017 | 763-295-8500 | Z2money@yahoo.com |
| William Anderson | Secretary | Teacher | 08/2014 | 08/2014 | 06/2018 | 763-355-7807 | Billa@swanrivermontessori.org |
| Alisha Brandon | Member | Teacher | 07/2014 | 07/2014 | 06/2017 | 612-636-1288 | allieb@swanrivermontessori.org |
| Nicole Perez | Member | Teacher | 07/2011 | 07/2011 | 06/2017 | 763-503-3896 | nicolep@swanrivermontessori.org |
| Cathy Augustson | Member | Community Member | 05/2016 | 07/2016 | 06/2020 | 763-295-3764 | caugustson@tds.net |
| Donald Frink | Member | Parent | 05/2016 | 07/2016 | 06/2020 | 612-804-8037 | Donald.frink@outlook.com |
| Katie Curtis | Ex-Officio | School Leader | - | - | - | 763-271-7926 | Katiec@swanrivermontessori.org |

**NOTE: All members listed are unrelated to each other.

The Board of Directors: Governance

The SRMCS Board of Directors strives to not only meet, but to exceed standards and expectations of typical school boards. Meetings are typically held the third Wednesday of each month, with the exception of July. Board packets are distributed by the School Director approximately one week prior to the meeting so members have time to look over the material. This packet includes the monthly financial statements as provided by our finance manager, student enrollment data, donations received, and any new and old business that is up for discussion or review. Meeting agendas are posted on the doors of the school and placed on the school web site for public viewing. Meeting minutes are also put on the web site once approved by the Board. Approved policies, reports, and other related materials are also placed on the web site for the general public. All meetings are conducted in accordance with MN Open Meeting Law.

Board of Directors Training Information: Initial

| Initial Training | | | | | | |
|-------------------|----------------------|---------------------------------|-------------|---------------------------------|-------------|------------------------|
| Board Member Name | Original Date Seated | Board's Role & Responsibilities | | Employment Policies & Practices | | Financial Management |
| Stacie Woods | 03/2006 | 12/2006 | MACS | 12/2006 | MACS | Unknown |
| Josetta Zetah | 07/2009 | Unknown | | Unknown | | Unknown |
| Alisha Brandon | 11/2013 | 12/12/2013 | Bryan Rossi | 03/13/2014 | Bryan Rossi | 03/13/2014 Bryan Rossi |

| | | | | |
|---------------------|---------|--|---|--|
| Nicole Perez | 07/2011 | 04/21/2012 School Business Solutions | 04/21/2012 School Business Solutions | 03/13/2014 Bryan Rossi |
| William Anderson | 08/2014 | 04/23/2015 Shane Weinand | 04/23/2015 Shane Weinand | 10/20/2014 MACS |
| Cathy Augustson | 07/2016 | Charter School Finance Basics | To Be Completed | 2/27/2017 MACS |
| Donald Frink | 07/2016 | 11/12/16 Effective Board Leadership with Bruce Miles, Big River Group | To Be Completed | 11/12/16 Charter School Basics with David Greenberg, ACNW |

Board of Directors Training Information: Annual

SRMCS is very committed to continuing professional development, including those who are on the Board of Directors. Beginning in 2014, board training has been added as an agenda item 2-3 times per year to ensure all members are up to date with annual training and in compliance with charter school governance law.

| Annual Training | | | |
|--------------------------|--|---|---|
| Board Member Name | Training Content Area | Training Date | Trainer/Presenter |
| Stacie Woods | Charter School Finance Basics | 4.20.17 | Dan Jett, Trim Tab Consulting, LLC |
| Alisha Brandon | Understanding How ACNW Evaluates Board Effectiveness | 11.12.16 | Rhianon Sargent, ACNW |
| | Charter School Finance Basics | 11.12.16 | David Greenberg, ACNW |
| | A Discussion on Using Compensation Models Effectively | 11.12.16 | Cam Stottler, North Lakes Academy |
| | Charter School Governance | 4.20.17 | Dan Jett, Trim Tab Consulting, LLC |
| William Anderson | Charter School Governance | 4.20.17 | Dan Jett, Trim Tab Consulting, LLC |
| Nicole Perez | Charter School Governance | 4.20.17 | Dan Jett, Trim Tab Consulting, LLC |
| Josetta Zetah | Resigned from Board Just Prior to Training | Resigned from Board Just Prior to Training | Resigned from Board Just Prior to Training |
| Donald Frink | Board Chairs – Conducting Effective Board Meetings to Support School Mission and Success | 11.12.16 | Dan Jett, Trim Tab Consulting |
| | Charter School Finance Basics | 11.12.16 | David Greenberg, ACNW |
| | Effective Board Leadership: Staying in Your Lane | 11.12.16 | Bruce Miles, Big River Group |
| | Charter School Governance | 4.20.17 | Dan Jett, Trim Tab Consulting, LLC |

| | | | |
|-----------------|--|----------|---|
| Cathy Augustson | Charter School Governance | 4.20.17 | Dan Jett, Trim Tab Consulting, LLC |
| | Financial Management | 2.27.17 | MACS |
| Katie Curtis | Executive Director Affinity Group Meeting | 11.12.16 | Tonica Adbur Salaam, JT Salaam & Associates |
| | Comprehensive Needs Assessment Planning | 11.12.16 | Sheilah Kavaney, Charter Source |
| | How Executive Directors Can Support Their School Boards for School Success | 11.12.16 | Dan Jett, Trim Tab Consulting |
| | Charter School Governance | 4.20.17 | Dan Jett, Trim Tab Consulting |

Management, Staffing Changes & Transitions

There were no administrative staffing changes or transitions in FY17.

List of Administrators & Qualifications

| Name | Title/Position | Primary Responsibilities | Education & Qualifications |
|--------------|-----------------|---|---|
| Katie Curtis | School Director | Full school oversight of students, parents, staff, financials, reporting, special education, enrollment, curriculum, and overall success of the school. | B.A. in Secondary Education M.A. in Organizational Leadership Graduate Level Early Childhood Montessori Certification |

Professional Development Plan & Implementation: School Director

The Board of Directors feels it vital to ensure anyone holding this administrative position is receiving ongoing education in relevant fields. Therefore, the Board of Directors requires the school director to receive a minimum of 125 Continuing Education Credits (CEUs) every five years. S/he is required to provide an annual update to the Board as to what credits have been earned and in what fields. This review is done annually in June.

Professional Development Goals for 2016-2017: School Director

Generally speaking, the School Director should receive approximately 25 continuing education hours per year keeping on track for re-licensure every five years. However, there are going to be years where more are earned than others. In FY17, the director received 23.25 hours while in FY16 the director obtained 55.0 hours. Arguably the area of greatest development continues to be under the umbrella of special education law as well as federal education accountability platforms like the World's Best Workforce and the Every Student Succeeds Act. Given that these requirements are often fluid, ongoing professional development is critical to remain in compliance with state and federal mandates.

List of Professional Development in FY17: School Director

| Date | Professional Development Title/Topic | Continuing Education Credits Received |
|------------|---|---------------------------------------|
| 08/30/2016 | Bloodborne Pathogens & Other Crisis Management Procedures, SRMCS | 1 |
| 8/31/2016 | Positive Schoolwide Climate and Culture with Chris Hagedorn, The Culture Piece Educator Training, Coaching and Consulting | 4 |
| 8/31/2016 | The Zones of Regulation: Program Implementation in a School Setting with Ashlee Fultz, COTA/L and Sue Jaeger, Speech Pathologist | 1 |
| 9/23/2019 | Identifying and Serving Students with Culturally Influenced Academic Delays; Applying EL Systems to Charter Districts, School Buildings, and Your Classroom; State Side Data on EL and SPED Federal Guidelines and Non-Biased Evaluations with Designs for Learning, St. Paul, MN | 6 |
| 9/28/2016 | Fall Discipline Webinar: Short-Term Disciplinary Removals with Sarah Knoph, MN Dept. of Education | 1 |
| 10/12/2016 | Fall Discipline Scenarios II: Nondiscriminatory Administration of School Discipline with Sarah Knoph, MN Dept. of Education | 1 |
| 10/24/2016 | Writing with Excellence: Implementation for Standardized Matriculation, SRMCS | 2 |
| 10/24/2016 | Personal, Work, and Community Safety with Sgt. Brian Johnson, Wright County Sheriff's Dept. | 1 |
| 11/12/2016 | Charter School Leader's Retreat, ACNW | 6.25 |

Total CEUs Earned in FY17: 23.25 Hours

Professional Development Goals for 2017-2018: School Director

As is the case for all licensed staff, the School Director will continue to earn continuing education credits to stay on track per licensure renewal requirements. Specific areas of development will include supporting high performing teams and learning styles, successful communication, and trauma/mental health in children and adults.

Staffing 2016-2017

The tables below contain information for all staff employed by the school or who provided services contractually. All of SRMCS lead teachers have a Minnesota teaching license and are Montessori certified for the grade levels they are teaching. Swan River is very proud that the majority of the non-lead teaching staff holds a Bachelor's Degree.

| 2016-2017 Licensed Teaching Staff | | | | |
|-----------------------------------|--------|---|-----------------|--|
| Name | File # | License / Assignment | 2017-18 Status* | Comments |
| Anderson, William | 319342 | Art (K-6), Tech (2-6), Environmental Ed (K-6) | R | Also holds a license in Parent Education |
| Bergquist-Savage, Amy | 420388 | Kindergarten & EC | R | |

| | | | | |
|----------------------|--------|--------------------------------|----|--|
| Alisha Brandon | 414937 | Grades 4-6 | NR | STEM Certified |
| Curtis, Kate | 388236 | School Director | R | |
| Frederiksen, Jessica | 468160 | Special Education | R | |
| Fuller, Amy | 434096 | PE for K-6 | R | On a limited license for special education |
| Halvorson, Julie | 489613 | Special Education | R | Community Expert |
| Holder, Daniel | 475036 | Grades 4-6 | R | Former Montessori Teacher Trainer |
| Jensen, Amy | 390666 | Grades 1-3 | R | STEM Certified |
| Matchinsky, Kristin | 321815 | Kindergarten & EC | NR | |
| McGorry, Jean | 352642 | Music/Band (EC-6) | R | |
| Figenshau, Heidi | 408124 | Special Education | R | Special Education Variance |
| Perez, Nicole | 398893 | Birth to 3 rd Grade | R | STEM Certified |
| Schneider, Sharon | 283179 | Grades 1-3 | R | STEM Certified |
| Stolp, Aaron | 399025 | Grades 4-6 | R | STEM Certified |

*R = Returning, NR = Not returning

2016-2017 Teacher Professional Development Activities

Please see page 40.

Licensed Teacher Percentage Turnover Rate:

2016-17 to 2017-18: 2 teachers = **13.3% Turnover Rate**

| 2016-2017 Other Licensed (Non-Teaching) Staff | | | | |
|---|--------|----------------------|-----------------|----------|
| Name | File # | License / Assignment | 2017-18 Status* | Comments |
| Evans, Ashley | 422503 | Special Ed. Director | R | |
| Jaeger, Sue | 442110 | Speech Pathologist | R | |
| Graf, Shelly | 443071 | School Counselor | R | |
| Schipper, Debra | 299257 | ASD Consultant | R | |

*R = Returning, NR = Not returning

| 2016-2017 Non-Licensed Staff | | | |
|------------------------------|--------------------------|-----------------|-------------------------------|
| Name | Assignment | 2017-18 Status* | Comments |
| Anderson, Cindy | Classroom Assistant | R | A.A. Degree, B.A. in progress |
| Blaha, Ashley | Classroom Assistant | R | B.A. Degree |
| Boelke, Sonia | Classroom Assistant | R | Montessori Trained |
| Brockman, Beth | Operations Coordinator | R | B.A. Degree |
| Brown, Rebecca | EC & Paraprofessional | R | B.A. Degree |
| Burg, Tasha | Program Paraprofessional | R | M.A. Degree |
| Dehmer, Jean | Program Paraprofessional | R | Paraprofessional Cert. |
| Erb, Nancy | Classroom Assistant | R | B.A. Degree |
| George, Lori | Program Paraprofessional | R | B.A. Degree |
| Halvorson, Julie | Literacy Specialist | R | B.A. Degree |
| Keene, Katie | Classroom Assistant | R | B.A. Degree |
| Klug, Amy | Program Paraprofessional | R | B.A. Degree |
| Oslund, Colleen | School Nurse | R | B.A. Degree |
| Paul, Barb | Classroom Assistant | R | |
| Quiring, Heidi | Program Paraprofessional | NR | |

| | | | |
|-----------------|--------------------------|---|-------------|
| Schroeder, Jen | Classroom Assistant | R | B.A. Degree |
| Spry, Amanda | Program Paraprofessional | R | |
| Uecker, Michele | Program Paraprofessional | R | A.A. Degree |
| Voight, Deb | Custodian | R | |
| Voight, Steve | Custodian | R | |
| Zachman, Cindy | Program Paraprofessional | R | |
| Zimney, Barb | Hot Lunch Coordinator | R | |

*R = Returning, NR = Not returning

Non-Licensed Staff Members Percentage Turnover Rate:

2016-17 to 2017-18: 1 staff member = **4.5% Turnover Rate**

Staffing 2017-2018

| 2017-2018 Licensed Teaching Staff | | | |
|--|---------------|--|--|
| Name | File # | License / Assignment | Comments |
| Anderson, William | 319342 | Art (K-6), Tech (2-6), Environmental Ed (K-6) | Also holds a license in Parent Education |
| Bergquist-Savage, Amy | 420388 | Kindergarten & EC | |
| Curtis, Kate | 388236 | School Director | |
| Frederiksen, Jessica | 468160 | Special Education | |
| Fuller, Amy | 434096 | PE for K-6 | On a limited license for special education |
| Halvorson, Julie | 489613 | Special Education | Community Expert |
| Holder, Daniel | 475036 | Grades 4-6 | Former Montessori Teacher Trainer |
| Jensen, Amy | 390666 | Grades 1-3 | STEM Certified |
| McGorry, Jean | 352642 | Music/Band (EC-6) | |
| Figenshau, Heidi | 408124 | Special Education | Special Education Variance |
| Perez, Nicole | 398893 | Birth to 3 rd Grade | STEM Certified |
| Schneider, Sharon | 283179 | Grades 1-3 | STEM Certified |
| Snyder, Shanny | 995732 | Kindergarten & EC | |
| Stolp, Aaron | 399025 | Grades 4-6 | STEM Certified |

| 2017-18 Other Licensed (Non-Teaching) Staff | | | |
|--|---------------|-----------------------------|-----------------|
| Name | File # | License / Assignment | Comments |
| Evans, Ashley | 422503 | Special Ed. Director | |
| Jaeger, Sue | 442110 | Speech Pathologist | |
| Graf, Shelly | 443071 | School Counselor | |
| Schipper, Debra | 299257 | ASD Consultant | |

| 2017-18 Non-Licensed Staff | | |
|-----------------------------------|---------------------|-------------------------------|
| Name | Assignment | Comments |
| Anderson, Cindy | Classroom Assistant | A.A. Degree, B.A. in progress |
| Blaha, Ashley | Classroom Assistant | B.A. Degree |

| | | |
|------------------|--------------------------|------------------------|
| Boelke, Sonia | Classroom Assistant | Montessori Trained |
| Brockman, Beth | Operations Coordinator | B.A. Degree |
| Brown, Rebecca | EC & Paraprofessional | B.A. Degree |
| Burg, Tasha | Program Paraprofessional | |
| Dehmer, Jean | Program Paraprofessional | Paraprofessional Cert. |
| Erb, Nancy | Classroom Assistant | B.A. Degree |
| George, Lori | Program Paraprofessional | B.A. in progress |
| Halvorson, Julie | Literacy Specialist | B.A. Degree |
| Keene, Katie | Classroom Assistant | B.A. Degree |
| Klug, Amy | Program Paraprofessional | B.A. Degree |
| Oslund, Colleen | School Nurse | B.A. Degree |
| Paul, Barb | Classroom Assistant | |
| Quiring, Heidi | Program Paraprofessional | |
| Schroeder, Jen | Classroom Assistant | B.A. Degree |
| Spry, Amanda | Program Paraprofessional | |
| Uecker, Michele | Program Paraprofessional | A.A. Degree |
| Voight, Deb | Custodian | |
| Voight, Steve | Custodian | |
| Zachman, Cindy | Program Paraprofessional | |
| Zimney, Barb | Hot Lunch Coordinator | |

Operational Performance

Health and Safety

The health and safety of Swan River’s students and staff is its number one priority. Below is a list of actions SRMCS takes each year to ensure the health and safety of its tenants.

- Each door at SRMCS has a coded security panel. Upon enrollment, each family is given a private code to gain access to the school building any time Monday through Friday from 7 a.m. to 5:30 p.m. Families are asked not to share these codes with anyone not affiliated with Swan River. Any person who does not have a school-issued code must buzz in manually. A member of the office staff will inquire who the person is via the intercom and will meet that person at the door once access is granted. All family codes are disabled over the summer months and any other days that school is not in session.
- Fire inspections are completed by the Fire Marshall as required.
- Students participate in five fire drills, five lock down drills, and two tornado drills annually.
- The sprinkler system and fire extinguishers are inspected annually.



- Appropriate space is given where required – entryways, exits, 18” of open space from the ceiling, maintenance rooms are orderly and locked at all times when students are present.
- Updated immunization forms are required from all students, including preschoolers.
- SRMCS does not employ a full-time school nurse. Therefore, there is a strict medication policy in place. All medication is kept locked in the main office and is distributed only by office personnel. Records are kept of all medication administered during the school day.
- SRMCS is licensed and inspected by the MN Department of Health twice a year. We do have a Certified Food Manager on site during the school day.
- Swan River is located within 15 miles of a nuclear power plant. Therefore, all staff has been trained in evacuation procedures and potassium iodide (KI) administration.
- Background checks are required of all staff, board members, and any adult volunteers 18 years of age or older who would have any contact with any student during the school day on or off site. These forms are kept on file in the main office.
- An Emergency Management Plan was developed in cooperation with the Wright County Sheriff’s Office and the Department of Homeland Security. A copy of this plan is located in each classroom, the office, and multipurpose space. Staff reviews it annually.



CELEBRATING GEORGE WASHINGTON’S BIRTHDAY!

on every student on file with the bus company in case there are changes in transportation and for bussing usage for field trips.

Transportation

To ensure the greatest level of safety, all students receive bus safety training within the first few weeks of school. Students in kindergarten through third grade also receive a second training before the end of the school year.

Administration keeps in close contact with Hoglund Transportation throughout each year. Any issues that arise regarding our students and provided transportation are dealt with immediately. Swan River does require that all families complete a Bus Registration Form regardless if bussing is used to and from school regularly. This is so we have information

Data Compliance and Reporting

SRMCS prides itself in the prompt submission of any mandated data to the MN Department of Education, the State of MN, our authorizer, and any other external entity we work with. There are staff who are designated for various types of data submissions. Ms. Brockman, Operational Manager, reports MARSS, CliCs, TRA, PERA and ADP Payroll Services. Ms. Curtis, School Director, completes and submits all STAR reports, DAC information, lease aid, the Annual

Report, World’s Best Workforce Plan and Summaries, and all other data required by external entities.

All web posting requirements from the MDE and ACNW are met.

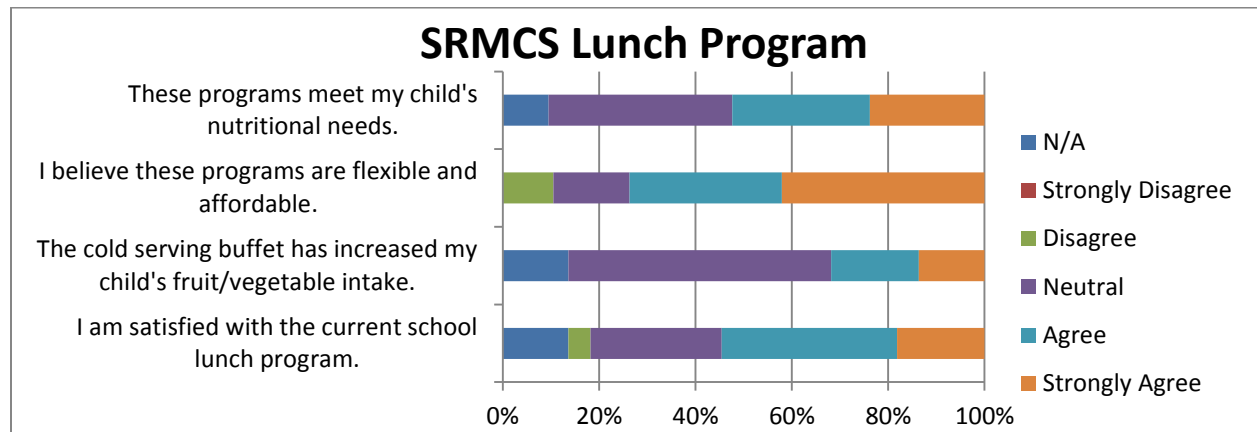
Facilities

SRMCS employs three, part-time custodians to care for the building and grounds. Staff are welcome to ask the custodial staff to help with small building and cleaning projects. Together, all areas are kept clean, orderly, and up to code.

Food Service Programs

SRMCS contracts with Premier Kitchens, Inc. for our hot lunch program as well as Kurt’s Home Delivery for milk. All food and nutrition guidelines are followed, including policies and procedures mandated by the MN Department of Health who completes on-site inspections two times per school year.

Historically, our Fund 2 Lunch Program has always financially sustained itself and is used frequently by most of our families. When surveyed, the following are the responses received from parents and students:



Due Process and Privacy Rights of Students

To ensure that all due process and data privacy rights of students are met, the SRMCS Board of Directors has approved the following policies:

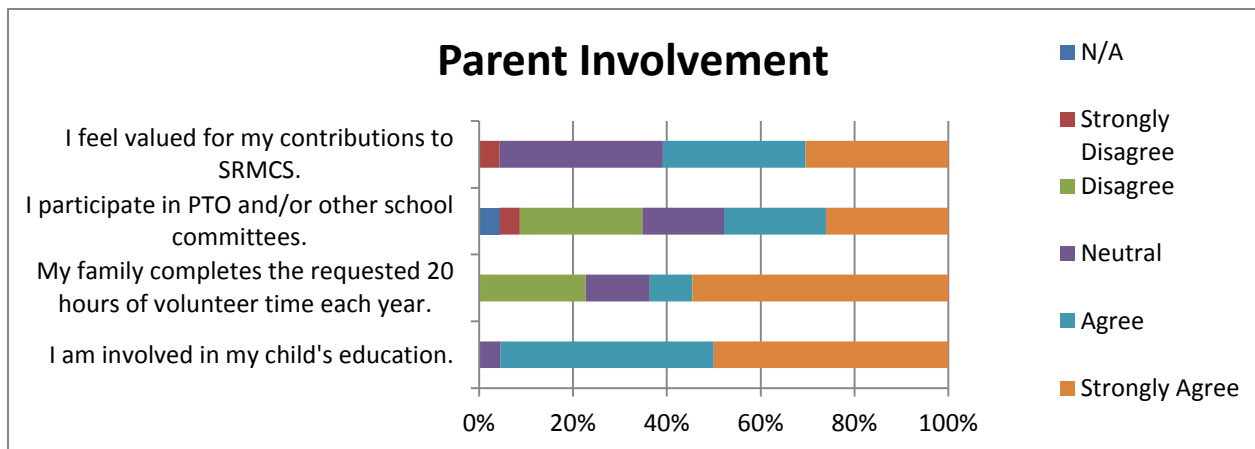
- Equal Education Opportunity Policy – SRMCS provides equal educational opportunity to all students and does not unlawfully discriminate on the basis of race, color, creed, religion, national origin, sex, marital status, parental status, status with regard to public assistance, disability, sexual orientation or age. The school district also makes reasonable accommodations for students with disabilities.

- Religion and Religious Expression Policies – This policy states that SRMCS shall neither promote nor disparage any religious belief or non-belief. Inclusion of religious music, art, drama, and literature are allowed provided it is intrinsic to the learning experience and is presented in an objective manner without sectarian indoctrination. To the extent possible, special school events shall be conducted at times which are not likely to conflict with observance of religious holidays.
- Protection and Privacy of Pupil Records – SRMCS recognizes its responsibility in regard to the collection, maintenance, and dissemination of pupil records and the protection of the privacy rights of students as provided in federal law and state statutes.

To view these policies in their entirety, please visit our web site at www.swanrivermontessori.org.

Parent & Community Engagement

As part of student enrollment at Swan River, we strongly encourage every family to contribute a minimum of 20 hours of volunteer time each school year. We find that being a small charter school, our resources are a bit more limited at times especially when compared to large school districts. This means that parent and community engagement is crucial to our ongoing success. We are very fortunate to have the support that we do. When surveyed about their own involvement, parents responded with the following:



Student Discipline

Respect for others and respect for self are two areas that, as Montessorians, we take very seriously. As part of the Montessori curriculum, our classrooms spend a lot of time on Peace Education. This includes providing lessons on conflict resolution, peer mediation, problem solving as well as others. We do not assume children immediately understand how to work in a group setting nor do we assume children have the ability to “work things out” with others without initial guidance from a role modeling adult. Our primary focus is to build a strong sense of community within our classrooms and in the school as a whole. The first weeks of school are largely dedicated to these grace and courtesy lessons.

However, situations arise when conflict resolution or peer mediation may not be enough and greater lengths need to be taken to help our students understand appropriate behavior. Therefore, SRMCS implements the Discipline Rubric when there are violations that exceed typical in-class reprimands. This rubric was created by the Discipline Committee which included numerous teachers, support staff, parents, and a Professor of Education from St. Cloud State University. The rubric has been included as it is printed in the SRMCS Parent Handbook.

Hiring Practices

Any time there is an employment position to be filled at SRMCS, hiring procedures are as follows:

1. Vacant position is identified.
2. Advertisements are placed to the public. Historically, we have utilized the Minnesota Work Force Center and EdPost via St. Cloud State University. A closing date for applications is given.
3. Application acceptance window closes.
4. Resumes and cover letters are reviewed by relevant personnel.
5. Office staff member notifies candidates and schedules interviews.
6. The standardized interview questions are distributed to all members of the Hiring Committee prior to the interview.
7. Interviews are conducted.
8. Secondary interviews are conducted, if necessary.
9. Committee decides on the best candidate to fill the position.
10. The School Director extends the offer to the candidate.
11. Assuming the candidate accepts the position, the School Director then notifies the Board of Directors at the upcoming board meeting. Members vote to approve the hire.



Pajama Day!

re-checked every other year while all volunteers are every three years. This is the same cycle that the surrounding school districts use as well. This check is very thorough as it includes local, state, and national registries.

Background Checks of Employees, Board Members & Volunteers

All adults 18 years of age and older must complete a background check in order to interact with students for any reason during the school day. This includes field trips, classroom celebrations, and general volunteering on school grounds. Employment is always contingent on background check results as is being a member of the Board of Directors. Employees and board members are

Finances

The information presented below is derived from preliminary audit figures. The full financial audit will be completed and presented to Minnesota Department of Education and Audubon Center of the North Woods no later than December 31, 2017.

For questions regarding school finances and for complete financials for 2016-17 and/or an organizational budget for 2017-18, please contact:

Name: Katie Curtis
 Position: School Director
 Address: Swan River Montessori Charter School
 500 Maple Street
 Monticello MN 55362
 Phone: 763-271-7926
 Email: katiec@swanrivermontessori.org

Sandy Schmidt of Sandmark LLC provides accounting services for Swan River Montessori Charter School, including monthly financials, bank reconciliations, annual budgets and budget revisions, use of SERVS via the Minnesota Department of Education, completion of the school's 990 tax form, and assistance with the auditing process.

FY17 Financial Overview by Fund

| FY17 Finances | Fund 1 | Fund 2 | Fund 4 | Building Co. |
|---------------------------|----------------|---------------|----------------|---------------------|
| Total Revenues | 1,840,640 | 64,832 | 176,863 | 198,403 |
| Total Expenditures | 1,861,566 | 59,903 | 191,384 | 194,288 |
| Net Income | (20,926) | 4,929 | (14,521) | 4,115 |
| Total Fund Balance | 456,721 | 9,195 | 163,581 | 55,206 |

Generally speaking, the fiscal year financial projections ended as expected. The loss in fund 1 of -\$20,926 was mostly intentional to spend down the fund balance. One-time expenditures were made for window treatments, additional security cameras, a school-wide paging system to increase student safety, and other similar singular expenses. The other portion of the lost was due to our music program. SRMCS had more students in band in FY17 than in previous years which equated to more hours worked by the band instructor. Beginning in FY18, the band instructor will receive a contracted annual salary versus earning an hourly wage so the school can better budget music-related expenses.

Revenues by Fund

Fund 1: Swan River's key sources of revenue include general education aid, charter school lease aid, and special education aid. The FY17 budget was based on 158 ADM though actual

enrollment was 159 ADM. Other secondary sources include federal special education aid, interest earned, literacy incentive aid, and donations.

Fund 2: It should be noted that the Food Services fund was self-sustaining, i.e. it did not have to receive supplemental funding from General Fund 1. According to our auditor from Clifton Larson Allen, Dennis Hoogeveen, the vast majority of schools must supplement their food service fund. However, due to responsible fiscal management, no loss was experienced in FY17.

Fund 4: Revenues for Fund 4 Community Service Fund come from two primary sources – tuition from the fee-based Children’s House Program and contracted service fees from the Extended Care Program. This revenue is paid to the school directly from families who have child(ren) enrolled in either or both of these programs.

Expenses & Use of Designated Funds

There are two primary expense sources. The first source are the standard expenses such as staff salaries/benefits, supplies/materials, general operations, purchased services, and equipment/furniture. The second large source was for one-time building updates including window treatments, additional security cameras, and the installation of a building-wide paging system. These were all planned purchases with the understanding that the school’s designated fund balance would show a slight loss for FY17. As of June 30, 2017 the following amounts are designated:

| DESIGNATED FUNDS | |
|---|--------|
| Fund 1 | Fund 4 |
| 168,464 | 93,037 |
| TOTAL DESIGNATED FUNDS = \$261,501 | |

Net Income and Fund Balance

As listed above, after all revenues and expenses are taken into consideration, the SRMCS fund balance continues to remain positive at \$629,497, including the Building Company balance of \$55,206. Historically, Swan River has always held a very healthy fund balance. Cash flow continues to be strong. Our Board of Directors is very fiscally responsible and reviews the monthly budget reports provided by Sandy Schmidt of Sandmark Services, LLC at every meeting. The Treasurer on the Board, Mr. Donald Frink, and is very knowledgeable in financial matters.

TOTAL BALANCE ALL FUNDS = \$684,703

World’s Best Workforce Annual Budget

While there is no specific line item in our annual budget referring to the World’s Best Workforce, there are significant funds being used to promote WBWF initiatives e.g. Reading

Well by Third Grade, closing the achievement gap, and kindergarten readiness. The primary expenditures are as follows:

| Person/Program for WBWF | Function | Budget Amount in FY17 |
|---|---|--|
| Julie Halvorson | Literacy Specialist – Meets with students 1:1 who have been flagged as being below grade level standards, particularly in reading. | Part-time salary = \$22,725 (\$3,266 is federally funded via CEIS dollars) |
| | Certification to Screen for Dyslexia – Graduate Level | \$1,200 |
| AIMS Web and Fountas & Pinnell Assessments | Allows teachers to better track progress over the course of the school year. | \$650 |
| Professional Development of Teachers & Non-Licensed Staff Members | To increase knowledge and understanding regarding students of various ability levels, particularly those students with increased needs. | \$3,780 |

Strategic Planning for the Future

Expansion Plans

While Swan River Montessori is at full capacity and there have been requests from various families, there are no plans to expand our site with regard to adding more general education classrooms for current or upper grade levels. We feel our small size is a large part of our success as a school. We have a wonderful sense of community and we feel growing too big would adversely affect that feeling. Therefore, we currently have no intentions of expanding in size or grade level.

Facility Changes: Long Range Planning

Knowing that items such as furniture, materials, carpet, books, etc. will need to be replaced over time, the Board of Directors has been working with Sandy Schmidt to create a long range plan for future expenses, included potential changes to our facilities. One of our greatest goals with regard to planning for the future is the construction of physical education facilities. Currently, SRMCS holds a lease with the Monticello Community Center for use of its gym, pool, and climbing wall. We are also obligated per this lease to purchase student memberships at full price. This lease costs Swan River upwards of \$70,000+ annually.

Rather than pay this money out, we wish to build a space that is large enough to hold P.E. classes as well as host school events like music performances, graduation, and so forth. Our lease expires in 2025 and the construction cost would likely pay for itself within a few short years. Though we have eight years to wait, we wish to use this time wisely to plan and financially

prepare for this project. Both the Board of Directors and the Building Company Board have heard this proposal and are eager to see this come to fruition.

Program Changes

Generally speaking, there were no significant changes to our programs at SRMCS. We continually work to improve our Special Education Federal Setting 2 & 3 classroom for students with exceptionally high needs. This is still relatively new to Swan River so we make adjustments as we need to, but, again, nothing of significance.

Also with regard to Special Education, a new related service provider has joined our team. This person is a social skills specialist for children with autism. We have had similar service providers on our team, however, this specialist focuses on personal care and independent, practical life skills.

Moving forward into the 2017-18 school year, our greatest focus will be on our natural playground initiative. While we are off to a good start, there are many ideas that the staff wishes to bring to fruition including an outdoor “American Ninja Warrior” area with logs, beams and rope. Even the staff is excited to get that going!

Technology Updates

SRMCS is very fortunate to have a PTO dedicated to supporting students. They have been diligent about funding teacher requests, particularly with classroom technology. Multiple iPads were purchased for student use in FY17 and their goal is to double that number in FY18.



...and ends
with us all.

Attachment 1: SRMCS Board Approved Calendar for 2016-2017

SRMCS 2016-2017

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

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

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

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

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

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

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

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

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

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

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

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

Tchr Work/no school
 No School
 Comp Day/no school
 Early Dismissal (12:

Attachment 2: SRMCS Board Approved Calendar for 2017-2018

SRMCS 2017-2018

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

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

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

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

Tchr Work/no school
 No School
 Comp Day/no school
 Early Dismissal (12:

Attachment 3: School Director Performance Evaluation Policy

Adopted: September 22, 2016

Reviewed:

School Director Performance Evaluation Policy

PURPOSE

The purpose of this policy is to define the procedures that the Swan River Montessori Charter School's Board of Directors will use to evaluate the overall performance of the School Director annually. It is the belief of the Board of Directors that feedback and personal development is the primary purpose of an evaluation process. An annual evaluation process ensures that personal reflection, mutual conversation and a time for setting goals occurs every year. Data is collected from staff, the School Director and Board of Directors in order to provide the fullest possible perspective.

PROCEDURES & TIMELINES

| TIME | ACTIVITY | PERSON(S) RESPONSIBLE FOR ACTIVITY COMPLETION |
|--------------|---|--|
| February | Review evaluation form(s) and processes. Make revisions, if necessary. Board members and School Director converse about the process to anticipate and address any concerns or interests. | Board of Directors or Designee(s) |
| Early March | Staff is provided copies of the Director's job description and performance evaluation form for review and completion. | Board of Directors or Designee(s) |
| Early March | School Director completes a self-evaluation. | School Director |
| Late March | Completed evaluations from staff and School Director are collected and compiled into one comprehensive document. This document is then forwarded to all members of the Board of Directors for review. | Board of Directors or Designee(s) |
| April | Board members analyze all input and create a confidential written document that provides feedback points and ideas for goal setting. | Board of Directors or Designee(s) |
| May | Board members and School Director meet in a closed session to discuss evaluation results and share and define goals. Both parties sign and date document. Original document is filed in the School Director's personnel file in the school's main office. | Board of Directors and School Director |
| June-January | Progress toward goals is reviewed as deemed necessary by the Board of Directors. | Board of Directors or Designee(s) |