

# **SWAN RIVER MONTESSORI CHARTER SCHOOL**

## **School Board Meeting**

**Tuesday, May 20, 2025 at 2:30 p.m.**

The school board will hold this meeting in person at Swan River Montessori Charter School at 503 Maple St. building.

### **Meeting Agenda**

#### **I. CALL TO ORDER in 503 Kitchen at Swan River Montessori Charter School by Jana Evink @   pm**

#### **II. ROLL CALL**

- a. Board Members Present:
- b. Board Members Absent:
- c. Other Attendees:
- d. Recording Minutes:

#### **III. REVIEW OF SRMCS MISSION AND VISION STATEMENTS**

The mission of Swan River Montessori Charter School 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.

Swan River Montessori Charter School's vision is to employ an interdisciplinary 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.

#### **IV. MEETING AGENDA-** Motion to approve meeting agenda made by , Seconded by . Board Vote- All "aye", Motion carries

#### **V. DECLARATION OF CONFLICTS-**

#### **VI. FINANCIAL REPORT**

April Financial Report --

Motion to approve April financials made by , Seconded by Board Vote- All "aye" Motion carries

- a. FY25 Enrollment Numbers as of 5.16.25
  - i. Charter School (K-6) = 167
  - ii. Children's House (EC) = 14
  - iii. Pupil Unit Actual/Budget = 167/163
- b. Review of Bills-
- c. Donations-

- VII. CONSENT AGENDA -** Motion to approve consent agenda made by Perez, Seconded by Halvorson. Board Vote- all aye, motion carries
- a. April Minutes
  - b.
- VIII. ENVIRONMENTAL EDUCATION REPORT AS RELATED TO CONTRACTED GOAL**
- IX. ACADEMIC PERFORMANCE REPORT AS RELATED TO CONTRACTED GOALS –**  
See attached report
- X. DIRECTOR GOALS-**
- XI. STRATEGIC PLANNING & GOAL SETTING-**
- XII. OLD BUSINESS-**
- XIII. NEW BUSINESS**
- a. Approve FY 26 Budget
  - b. Approve accountant
  - c. Board election results – Swearing in of Newly Appointed Board Members
  - d. Compensation for substitute Teachers & Support Staff Policy-  
Review Salary Survey conducted by MACS
  - e. Review visit from Osprey Wilds – Jana will report
- XIV. REVIEW OF NEXT MEETING AGENDA**
- a. Date, Time & Location of next Board Meeting – **June 17, 2025 in the 503 building @ 2:30 pm**
  - b. Upcoming Agenda Items
- New Business  
Set Dates/Times for Upcoming Fiscal Year Board Meetings  
Building Board Appointments  
List of Professional Development for Staff
- XV. MOTION TO ADJOURN by at PM, Seconded by . Board Vote- all in favor ‘ aye’ , motion carries**



# Swan River Montessori Monthly Financials

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APRIL 2025

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EdFinMN

FINANCE AND ACCOUNTING SERVICES FOR CHARTER  
SCHOOL AND EDUCATION SUPPORT ORGANIZATIONS

# Swan River Montessori Financial Highlights

APRIL 2025

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## Balance Sheet:

The School's balance sheet reflects the school's liquid assets and liabilities. The primary focus of the balance sheet is the cash balance and any material liabilities. Additionally, attention should be paid to the amount of the YTD state hold back. The highlights from the balance sheet are:

- \$785,386 Cash balance at end of the month
- \$244,190 State receivables which represents an initial estimate for the beginning of the accrual for the FY24 hold back
- \$9,825 State receivables which represents the remaining amount due to the school from the state 10% holdback of the prior school year
- \$147,797 Salary and benefits payables estimated. This is for summer salaries as of month-end.

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## Income Statement

The focus of the school's income statement is to monitor the ongoing revenues and expenses of the various programs. A monthly review of the actual spent vs. budget as well as taking into consideration the percentage of the fiscal year completed is imperative. Yet, also understanding how each individual line-item functions will help the overall analysis. The highlights from the income statement are:

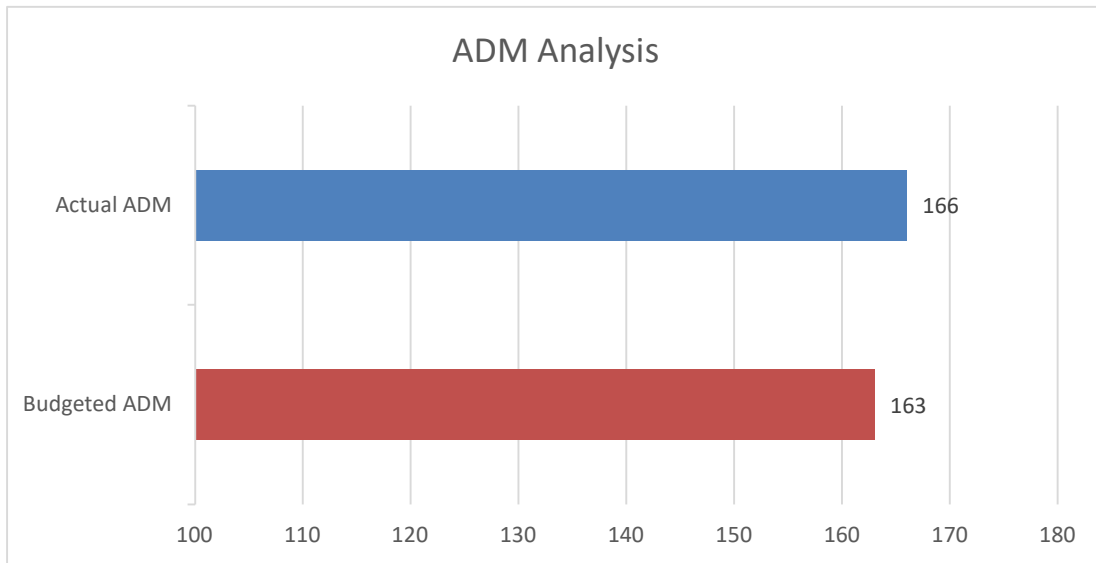
- Adopted Budget: 163 ADM
- Working Budget: 163 ADM
- Actual ADM 166
- 83% Percent of the fiscal year completed
- 81% YTD revenue as a percent of budget based on the working budget.
- 78% YTD expenses as a percent of budget based on the working budget.
- \$750,893 Projected year end fund balance
- 28% Projected ending fund balance as a % of expense budget

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## Cash Flow:

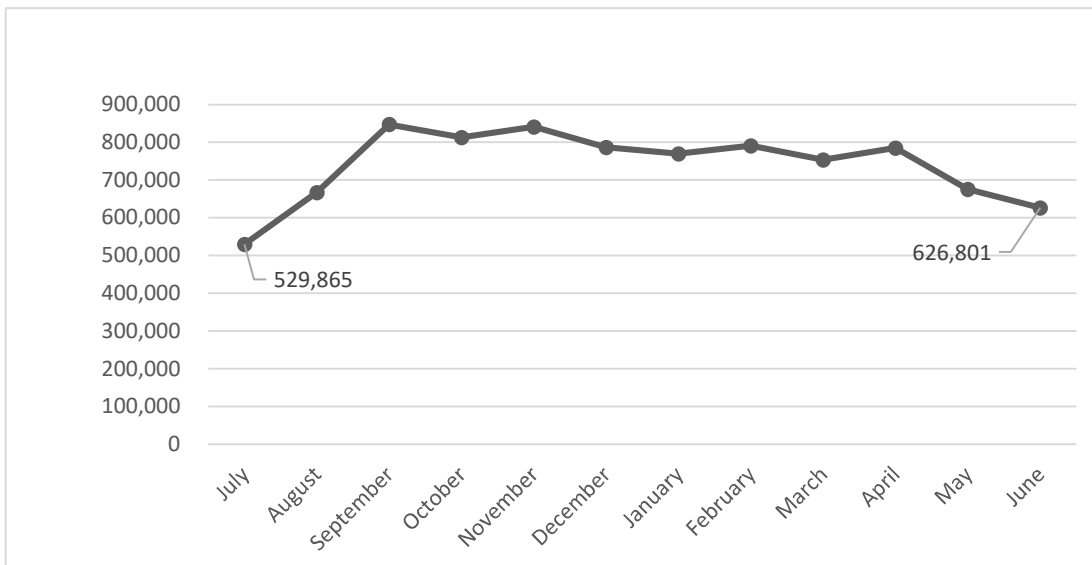
- Estimated cash balance as of June 30, 2025  
\$ 626,801

## Enrollment/ADM's



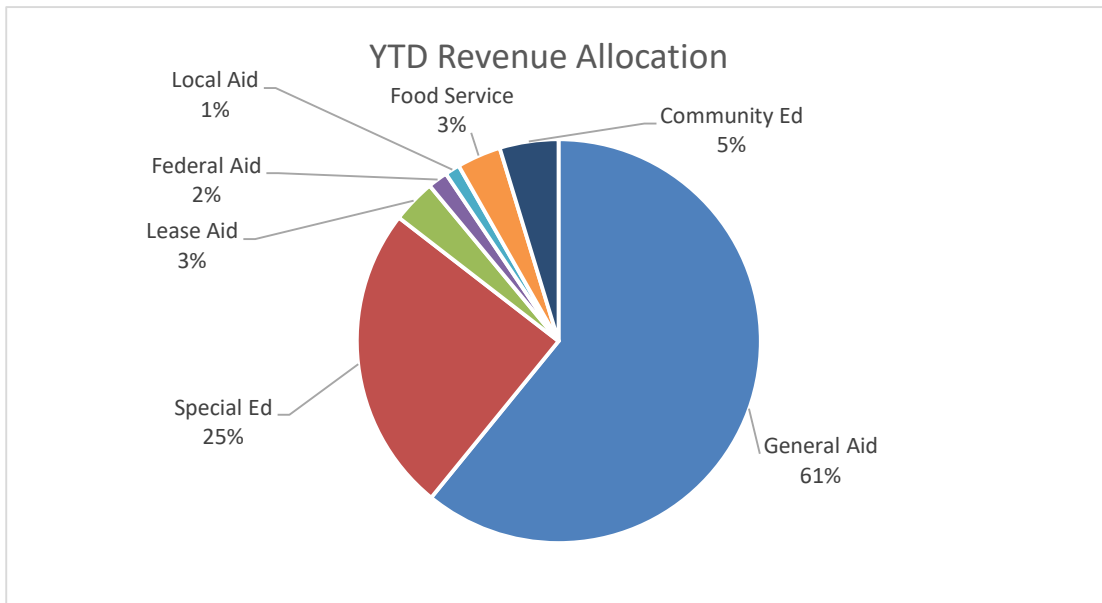
Monitoring the school's budgeted ADM vs. the actual ADM is one of the most important analytical revenue reviews. Variance from the budgeted ADM must be reviewed and understood.

## Cash Flow Projection



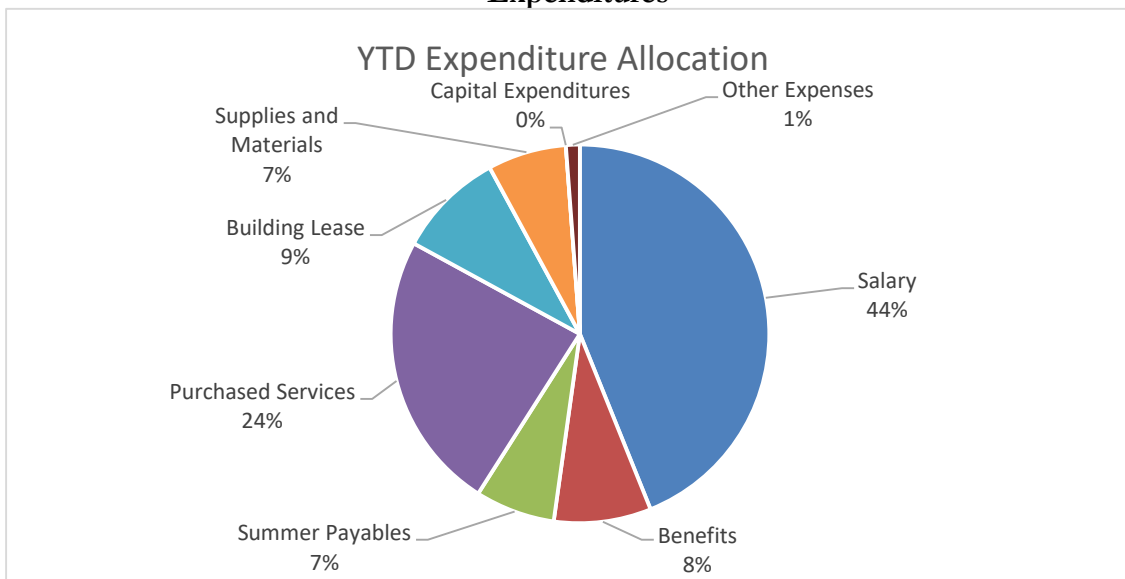
Swan River's cash balance is expected to increase slightly during fiscal 2024.

## Revenue



The graph above reflects the revenue allocation the school has received from all revenue sources to date.

## Expenditures



The graph above reflects the current year to date expenditure allocation across the school's major budget categories. This depiction helps identify how the school has spent their funds thus far.

**Swan River Montessori Charter School**  
**Balance Sheet**  
**As of April 30, 2025**

<b>Assets</b>		<b>As of Month-End</b>
Cash		785,386
MDE Receivable - Current year estimate		244,190
MDE Receivable - Prior year		9,825
Total Assets	\$	1,039,401
<b>Liabilities</b>		
Salary and Benefits Payable	\$	147,797
Accounts Payable		61,103
Total Liabilities	\$	208,900
<b>Fund Balance</b>		
Beginning - Audited	\$	737,684
Change in Fund Balance		92,817
Ending- Projected	\$	830,501
Total Liabilities and Fund Balance	\$	1,039,401

*\*\*Current year based on estimated, primarily for ADM numbers.\*\**

**Swan River Montessori Charter School**  
**Income Statement Summary**  
**As of April 30, 2025**

<b>Revenue</b>	<b>Adopted Budget - 163ADM/ 163PU</b>	<b>Working Forecast - 163ADM/ 163PU</b>	<b>Monthly Activity</b>	<b>Year to Date</b>	<b>% of Budget</b>
State Aids	\$ 2,474,328	\$ 2,559,113	\$ 190,190	\$ 2,060,542	80.5%
Federal Aids	48,668	50,426	20,013	68,267	135.4%
Local	103,725	106,825	14,289	81,357	76.2%
<b>Total</b>	<b>\$ 2,642,819</b>	<b>\$ 2,736,459</b>	<b>\$ 224,493</b>	<b>\$ 2,210,166</b>	<b>80.8%</b>
<b>Expense</b>					
Salary	\$ 1,207,336	\$ 1,284,763	\$ 110,119	\$ 929,473	72.3%
Benefits	275,914	300,407	27,634	175,961	58.6%
Summer Payables	-	-	-	144,337	NA
Purchased Services	579,909	611,186	59,528	506,339	82.8%
Supplies and Materials	231,368	231,368	34,452	142,241	61.5%
Capital Expenditures	253,380	253,380	16,532	193,642	76.4%
Other Expenses	38,149	42,146	13	25,357	60.2%
<b>Total</b>	<b>\$ 2,586,056</b>	<b>\$ 2,723,250</b>	<b>\$ 248,277</b>	<b>\$ 2,117,349</b>	<b>77.8%</b>
<b>Change in Fund Balance</b>	<b>\$ 56,763</b>	<b>\$ 13,209</b>	<b>\$ (23,785)</b>	<b>\$ 92,817</b>	
<b>Beginning Fund Balance</b>	<b>737,684</b>	<b>737,684</b>	<b>737,684</b>	<b>737,684</b>	
<b>Ending- Projected</b>	<b>\$ 794,447</b>	<b>\$ 750,893</b>	<b>\$ 713,899</b>	<b>\$ 830,501</b>	
 FB as a % of Exp	 31%	 28%			

<b>Fund</b>	<b>Beginning Fund Balance 7/1/2024 - Audited</b>	<b>Projected Revenues</b>	<b>Projected Expenditures</b>	<b>Projected Fund Balance 6/30/2025</b>	<b>Profit (Loss) CY</b>
General Fund 1	699,039	2,452,234	2,458,450	692,823	(6,216)
Food Service Fund 2	3,333	158,600	158,600	3,333	-
Community Service Fund 4	35,312	125,625	106,200	54,737	19,425
	<b>737,684</b>	<b>2,736,459</b>	<b>2,723,250</b>	<b>750,893</b>	<b>13,209</b>



Swan River Montessori Charter School  
Detail Revenue  
As of April 30, 2025

83% Year Complete

	Adopted Budget - 163ADM/ 163PU	Working Forecast - 163ADM/ 163PU	Monthly Activity	Year to Date	% of Budget
<b>General Fund</b>					
<b>State Aid</b>					
General Aid	\$ 1,298,245	\$ 1,291,243	\$ 83,904	\$ 1,052,736	82%
Special Ed	690,063	776,706	84,106	523,647	67%
Lease Aid	214,182	214,182	-	74,504	35%
Literacy Incentive Aid	17,793	20,103	-	18,093	90.0%
Hourly Worker Unemployment	29,663	37,574	-	33,817	90.0%
School Library Aid	19,944	20,000	-	12,530	62.6%
Student Support Aid	19,304	20,000	-	6,000	30.0%
READ Act Literacy Aid	-	-	-	3,882	N/A
READ Act Training Aid	-	-	-	5,842	N/A
State Aid Receivables*	-	-	-	244,190	N/A
Total State Aid	\$ 2,289,194	\$ 2,379,808	\$ 168,010	\$ 1,975,241	83%
<b>Federal Aid</b>					
Title I	\$ 17,644	\$ 24,238	\$ 1,691	\$ 11,833	49%
Special Ed	31,024	26,188	10,500	21,950	84%
Total Federal Aid	\$ 48,668	\$ 50,426	\$ 12,191	\$ 33,783	67%
<b>Local Aid and Donation</b>					
Interest	\$ 500	\$ 6,500	\$ 594	\$ 5,936	91%
Miscellaneous	8,000	4,500	4,936	9,457	210.1%
Donations and Other	10,000	1,000	-	687	69%
Fees for Services	400	10,000	782	9,337	93%
Total Local and Donation	\$ 18,900	\$ 22,000	\$ 6,312	\$ 25,416	116%
<b>Total General Fund Revenue</b>	<b>\$ 2,356,762</b>	<b>\$ 2,452,234</b>	<b>\$ 186,513</b>	<b>\$ 2,034,440</b>	<b>83%</b>
<b>Food Service Fund</b>					
State Revenue	\$ 137,134	\$ 138,505	\$ 13,238	\$ 40,379	29%
Federal Revenue	-	-	7,822	34,484	N/A
Food Sales	-	-	2	18	N/A
Transfer from General	16,098	20,095	-	-	0%
<b>Total Food Service Revenue</b>	<b>\$ 153,232</b>	<b>\$ 158,600</b>	<b>\$ 21,063</b>	<b>\$ 74,881</b>	<b>47%</b>
<b>Community Service Fund</b>					
Before/After School Care	\$ 48,000	\$ 40,800	\$ 8,942	\$ 44,922	110%
Children's House Tuition	84,825	84,825	7,975	55,923	66%
<b>Total Community Service Revenue</b>	<b>\$ 132,825</b>	<b>\$ 125,625</b>	<b>\$ 16,917</b>	<b>\$ 100,845</b>	<b>80%</b>
<b>Total Revenue- All Funds</b>	<b>\$ 2,642,819</b>	<b>\$ 2,736,459</b>	<b>\$ 224,493</b>	<b>\$ 2,210,166</b>	<b>81%</b>

Swan River Montessori Charter School  
Detail Expense  
As of April 30, 2025

FYTD: 83%

	Adopted Budget - 163ADM/ 163PU	Working Forecast - 163ADM/ 163PU	Monthly Activity	Year to Date	% of Budget
<b>Admin and Operations</b>					
100 Salaries	\$ 124,009	\$ 123,989	\$ 10,073	\$ 98,129	79%
200 Benefits	30,727	30,997	10,398	31,800	103%
305 Contracted Services	138,933	170,000	4,802	119,226	70%
320 Communication	6,026	6,026	513	4,449	74%
329 Postage	904	904	-	200	22%
330 Utilities	37,316	37,316	4,040	30,057	81%
340 Insurance	24,411	24,411	4,807	21,692	89%
350 Repairs & Maintenance	2,040	2,040	570	2,159	106%
366 Conferences/Professional Development	5,250	5,250	-	-	0%
401 General Supplies	24,102	24,102	5,570	21,518	89%
405 Purchased Software (405/406)	510	510	4,181	5,615	1101%
490 Food	460	460	-	252	55%
570 Building Lease	253,380	253,380	16,532	193,642	76%
820 Dues & Memberships	20,948	20,948	-	21,656	103%
899 Misc Expenses - Missing Support	-	-	-	739	0%
910 Transfers to Other Funds	16,098	20,095	-	-	0%
<b>Total Admin and Operations</b>	<b>\$ 685,114</b>	<b>\$ 720,428</b>	<b>\$ 61,486</b>	<b>\$ 551,134</b>	<b>77%</b>
<b>Instructional Support and Services</b>					
100 Salaries	\$ 615,585	\$ 612,741	\$ 53,089	\$ 429,051	70%
200 Benefits	152,528	153,185	10,192	86,676	57%
1XX/2XX Summer Payable	-	-	-	81,432	NA
305 Contracted Services	-	-	1,286	35,581	0%
360 Transportation - Field Trips	12,555	12,555	-	5,854	47%
366 Conferences/Professional Development	6,300	6,300	150	1,948	31%
369 Field Trips and Registration	-	-	641	1,889	0%
401 General Supplies	13,948	13,948	1,036	10,770	77%
405 Purchased Software (405/406)	-	-	60	737	0%
430 Instructional Supplies	29,756	29,756	124	2,516	8%
455 Technology Supplies	-	-	-	2,441	0%
461 Standardized Tests	2,625	2,625	-	-	0%
490 Food	-	-	-	(9)	0%
820 Dues & Memberships	1,103	1,103	13	2,962	269%
<b>Total Instructional Support and Services</b>	<b>\$ 834,400</b>	<b>\$ 832,213</b>	<b>\$ 66,591</b>	<b>\$ 661,847</b>	<b>80%</b>

Swan River Montessori Charter School  
Detail Expense  
As of April 30, 2025

FYTD: 83%

	Adopted Budget - 163ADM/ 163PU	Working Forecast - 163ADM/ 163PU	Monthly Activity	Year to Date	% of Budget
<b>Special Education</b>					
100 Salaries	\$ 361,907	\$ 436,155	\$ 38,456	\$ 329,942	76%
200 Benefits	89,672	109,039	6,649	54,219	50%
1XX/2XX Summer Payable	-	-	-	62,905	NA
305 Contracted Services	7,166	7,166	-	(73)	-1%
366 Conferences/Professional Development	1,130	1,130	2,317	3,224	285%
394 Payments to Other Agencies	316,654	316,654	38,961	267,905	85%
401 General Supplies	4,599	4,599	-	1,983	43%
405 Purchased Software	1,725	1,725	-	2,375	138%
430 Instructional Supplies	-	-	-	250	0%
433 Instructional Supplies- Ind	8,671	8,671	-	-	0%
<b>Total Special Education</b>	<b>\$ 791,524</b>	<b>\$ 885,139</b>	<b>\$ 86,382</b>	<b>\$ 722,729</b>	<b>82%</b>
<b>Title Programs</b>					
100 Salaries	-	16,536	-	-	0%
200 Benefits	-	4,134	-	-	0%
<b>Total Title Programs</b>	<b>-</b>	<b>20,670</b>	<b>-</b>	<b>-</b>	<b>0%</b>
<b>Total General Fund Expenditures</b>	<b>\$ 2,311,038</b>	<b>\$ 2,458,450</b>	<b>\$ 214,459</b>	<b>\$ 1,935,711</b>	<b>79%</b>
<b>Food Service Fund</b>					
100 Salaries	\$ 6,569	\$ 12,206	\$ 1,157	\$ 9,917	81%
200 Benefits	2,987	3,052	395	3,266	107%
401 General Supplies	-	-	1,920	8,381	0%
490 Food	143,342	143,342	21,561	83,845	58%
820 Dues & Memberships	-	-	-	700	0%
<b>Total Food Service</b>	<b>\$ 152,898</b>	<b>\$ 158,600</b>	<b>\$ 25,032</b>	<b>\$ 106,110</b>	<b>67%</b>
<b>Community Ed Fund</b>					
100 Salaries	\$ 99,266	\$ 83,136	\$ 7,345	\$ 62,433	75%
200 Benefits	20,992	21,202	1,442	12,229	58%
394 Field Trips	232	232	-	-	0%
401 General Supplies	1,418	1,418	-	809	57%
430 Instructional Supplies	-	-	-	57	0%
820 Dues & Memberships	212	212	-	-	0%
<b>Total Community Ed</b>	<b>122,120</b>	<b>106,200</b>	<b>8,787</b>	<b>75,529</b>	<b>71%</b>
<b>Total Expense- All Funds</b>	<b>\$ 2,586,056</b>	<b>\$ 2,723,250</b>	<b>\$ 248,277</b>	<b>\$ 2,117,349</b>	<b>78%</b>

Swan River Montessori Charter School  
CashFlow Summary  
As of April 30, 2025

2 Months Remaining

Cash Receipts	Budget	Monthly Activity	Year to Date	May	June	Total	Remaining
State Aids- Current Year	\$ 2,379,808	\$ 168,010	\$ 1,731,051	\$ 168,212	\$ 168,106	\$ 2,067,369	\$ 312,439
State Aids- Prior Year	9,825	-	-	-	-	-	-
Federal - Current Year	50,426	12,191	-	-	-	-	50,426
Local	147,625	23,229	126,261	10,682	10,682	147,625	-
Food Service	158,600	21,063	74,881	39,766	39,766	154,414	4,186
Total Inflows	\$ 2,746,284	\$ 224,493	\$ 1,932,193	\$ 218,660	\$ 218,554	\$ 2,369,408	\$ 367,051
Expense							
Salary	\$ 1,284,763	\$ 110,119	\$ 929,473	\$ 107,064	\$ 107,064	\$ 1,143,600	\$ 141,163
Benefits	300,407	27,634	175,961	25,034	25,034	226,029	74,378
Purchased Services	611,186	59,528	506,339	52,424	52,424	611,186	-
Supplies and Materials	231,368	34,452	142,241	44,564	44,564	231,368	-
Capital Expenditures	253,380	16,532	193,642	29,869	29,869	253,380	-
Other Expenses	42,146	13	25,357	8,395	8,395	42,146	-
Accounts Payable	-	-	-	61,103	-	61,103	-
Total Outflows	\$ 2,723,250	\$ 248,277	\$ 1,973,012	\$ 328,451	\$ 267,348	\$ 2,568,812	\$ 215,541
Change in Cash				\$ (109,791)	\$ (48,794)	\$ (199,404)	
Beginning				\$ 785,386	\$ 675,595		
Line of Credit				\$ -	\$ -		
Ending- Projected				\$ 675,595	\$ 626,801		

# NOTES TO THE FINANCIAL STATEMENTS

## APRIL 2025

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- The financials statements are drafted on an accrual basis of accounting.
  - The financial statements are drafted based on information received from the school's leadership.
  - The numbers are subject to change based on timing of information received from the school.
  - The school's budget is based on full accrual projections as of the end of the fiscal year.
  - This report is unaudited and is prepared for internal use only.
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Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type
SHBC	1053			City of Monticello		Wire
		E 01 005 810 000 330		Water & Sewer 503 Maple St 02/01/25-02/28/25		\$54.96
PO#:	Voucher #:	14006	Invoice	Invoice No: DT040125	4/2/2025	Paid Amt: \$54.96
		E 01 005 810 000 330		Water & Sewer 500 Maple St 02/01/25-02/28/25		\$179.98
PO#:	Voucher #:	14007	Invoice	Invoice No: DT040125	4/2/2025	Paid Amt: \$179.98
						Check Amount: \$234.94
SHBC	1639			TSYS		Wire
		E 01 005 110 000 305		Payment Processing Fees -April		\$341.82
PO#:	Voucher #:	14008	Invoice	Invoice No: DT040225	4/2/2025	Paid Amt: \$341.82
						Check Amount: \$341.82
SHBC	1001			PERA		Wire
		B 01 215 007		PERA		\$2,470.10
PO#:	Voucher #:	13994	Invoice	Invoice No: S2025180	4/4/2025	Paid Amt: \$2,470.10
						Check Amount: \$2,470.10
SHBC	1002			TRA		Wire
		B 01 215 006		TRA		\$5,372.60
PO#:	Voucher #:	13995	Invoice	Invoice No: S2025180	4/4/2025	Paid Amt: \$5,372.60
						Check Amount: \$5,372.60
SHBC	1566			IRS		Wire
		B 01 215 002		Federal Tax		\$9,328.34
PO#:	Voucher #:	13996	Invoice	Invoice No: S2025180	4/4/2025	Paid Amt: \$9,328.34
						Check Amount: \$9,328.34
SHBC	1572			MN Unemployment Insurance		Wire
		E 01 005 110 000 280		MN Unemployment		\$8,456.00
PO#:	Voucher #:	14009	Invoice	Invoice No: DT040425	4/4/2025	Paid Amt: \$8,456.00
						Check Amount: \$8,456.00
SHBC	1616			MedSurety		Wire
		B 01 215 016		Payroll Deductions-Vision		\$731.68
PO#:	Voucher #:	13992	Invoice	Invoice No: S2025180	4/7/2025	Paid Amt: \$731.68
						Check Amount: \$731.68
SHBC	1050			SRCS Building Co		Wire
		E 01 005 850 000 348 570		Lease -April		\$16,531.67
PO#:	Voucher #:	14010	Invoice	Invoice No: DT041625	4/16/2025	Paid Amt: \$16,531.67
						Check Amount: \$16,531.67

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	1616			MedSurety		Wire	
		E 01 005 110 000 305		HSA Fee			\$33.00
PO#:	Voucher #:	14011	Invoice	Invoice No: 40563	4/16/2025	Paid Amt:	\$33.00
						Check Amount:	\$33.00
SHBC	1644			Nelnet		Wire	
		E 01 005 110 000 305		Payment Processing Fees -April			\$12.29
PO#:	Voucher #:	14012	Invoice	Invoice No: DT041625	4/16/2025	Paid Amt:	\$12.29
						Check Amount:	\$12.29
SHBC	1001			PERA		Wire	
		B 01 215 007		PERA			\$3,706.18
PO#:	Voucher #:	14003	Invoice	Invoice No: S2025190	4/22/2025	Paid Amt:	\$3,706.18
						Check Amount:	\$3,706.18
SHBC	1002			TRA		Wire	
		B 01 215 006		TRA			\$5,517.80
PO#:	Voucher #:	14004	Invoice	Invoice No: S2025190	4/22/2025	Paid Amt:	\$5,517.80
						Check Amount:	\$5,517.80
SHBC	1566			IRS		Wire	
		B 01 215 002		Federal Tax			\$11,479.34
PO#:	Voucher #:	14005	Invoice	Invoice No: S2025190	4/22/2025	Paid Amt:	\$11,479.34
						Check Amount:	\$11,479.34
SHBC	1567			MN Dept. Revenue		Wire	
		B 01 215 003		State Tax			\$1,751.46
PO#:	Voucher #:	14002	Invoice	Invoice No: S2025190	4/22/2025	Paid Amt:	\$1,751.46
						Check Amount:	\$1,751.46
SHBC	1567			MN Dept. Revenue		Wire	
		B 01 215 003		State Tax			\$1,350.09
PO#:	Voucher #:	13993	Invoice	Invoice No: S2025180	4/7/2025	Paid Amt:	\$1,350.09
						Check Amount:	\$1,350.09
SHBC	1052			Centerpoint Energy		Wire	
		E 01 005 810 000 330		Gas Charges- 503 Maple	02/06/25-03/07/25		\$307.53
PO#:	Voucher #:	14024	Invoice	Invoice No: DT040825	4/8/2025	Paid Amt:	\$307.53
						Check Amount:	\$307.53
SHBC	1052			Centerpoint Energy		Wire	
		E 01 005 810 000 330		Gas Charges- 500 Maple St	02/06/25-03/07/25		\$1,020.54
PO#:	Voucher #:	14025	Invoice	Invoice No: DT040825	4/8/2025	Paid Amt:	\$1,020.54
						Check Amount:	\$1,020.54

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type
SHBC	1054			Xcel Energy		Wire
		E 01	005	810 000 000 330	Electric Charges02/04/25-03/13/25	\$1,346.34
PO#:	Voucher #:	14052	Invoice	Invoice No: 918640224	4/11/2025	Paid Amt: \$1,346.34 Check Amount: \$1,346.34
SHBC	1530			Sherburne State Bank		Wire
		E 01	005	110 000 000 305	Service Fee	\$35.00
PO#:	Voucher #:	14053	Invoice	Invoice No: DT043025	4/30/2025	Paid Amt: \$35.00 Check Amount: \$35.00
SHBC	1616			MedSurety		Wire
		B 01	215	016	Payroll Deductions-Vision	\$731.68
PO#:	Voucher #:	14001	Invoice	Invoice No: S2025190	4/23/2025	Paid Amt: \$731.68 Check Amount: \$731.68
SHBC	1184			US Bank - Credit Card		Wire
		E 01	005	110 000 000 305	Office Services	\$51.08
		E 01	005	110 000 000 320	Communications	\$512.84
		E 01	005	110 000 000 405	Software	\$21.46
		E 01	005	810 000 000 401	Facility Supplies	\$51.48
		E 01	005	940 000 000 340	EMC Benefits	\$4,806.63
		E 01	010	203 000 000 220	MN NICE Benefits	\$440.39
		E 01	010	203 000 000 401	School Supplies	\$509.57
		E 01	010	203 000 000 430	Supplies	\$49.37
		E 01	010	420 000 740 394	SpEd Headphones	\$19.98
PO#:	Voucher #:	14059	Invoice	Invoice No: DT041025	4/10/2025	Paid Amt: \$6,462.80 Check Amount: \$6,462.80
SHBC	1530			Sherburne State Bank		Wire
		E 01	010	203 000 000 820	Spotify	\$12.87
PO#:	Voucher #:	14060	Invoice	Invoice No: DT041825	4/21/2025	Paid Amt: \$12.87 Check Amount: \$12.87
SHBC	18507 1222			Blue Cross/Blue Shield of MN		Check
		B 01	215	009	Insurance Premiums Dental Feb	\$332.00
PO#:	Voucher #:	13957	Invoice	Invoice No: 250228147981	4/15/2025	Paid Amt: \$332.00 Check Amount: \$332.00
SHBC	18508 1618			MN PEIP		Check
		B 01	215	015	Health Insurance -April 25	\$6,008.98
PO#:	Voucher #:	13971	Invoice	Invoice No: 1503307	4/15/2025	Paid Amt: \$6,008.98 Check Amount: \$6,008.98



Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	18509	1661		Nova Education Consultants		Check	
			E 01	010 410 000 740 394	OT Services E Boughtner 03/10/25-03/21/25 64..		\$7,067.50
PO#:	Voucher #:	13999	Invoice	Invoice No: 2973	4/15/2025	Paid Amt:	\$7,067.50
						Check Amount:	\$7,067.50
SHBC	18510	1698		Rebecca McMullens		Check	
			E 01	005 110 000 000 305	MARSS Reporting 03/04/25-03/27/25		\$1,372.50
PO#:	Voucher #:	14000	Invoice	Invoice No: 674	4/15/2025	Paid Amt:	\$1,372.50
						Check Amount:	\$1,372.50
SHBC	18511	1204		Adam's Pest Control, Inc.		Check	
			E 01	005 810 000 000 305	Prevention Plus		\$85.00
PO#:	Voucher #:	14013	Invoice	Invoice No: 4081145	4/28/2025	Paid Amt:	\$85.00
						Check Amount:	\$85.00
SHBC	18512	1482		Designs for Learning INC		Check	
			E 01	010 640 000 000 366	Staff PD		\$150.00
PO#:	Voucher #:	14021	Invoice	Invoice No: 25-0723	4/28/2025	Paid Amt:	\$150.00
						Check Amount:	\$150.00
SHBC	18513	1245		Innovative Office Solutions		Check	
			E 01	005 810 000 000 401	Facility Supplies		\$432.56
PO#:	Voucher #:	14015	Invoice	Invoice No: IN4818273	4/28/2025	Paid Amt:	\$432.56
			E 01	005 810 000 000 401	Facility Supplies		\$67.17
PO#:	Voucher #:	14016	Invoice	Invoice No: IN4810019	4/28/2025	Paid Amt:	\$67.17
						Check Amount:	\$499.73
SHBC	18514	1690		Perfection Plus, Inc		Check	
			E 01	005 810 000 000 401	Facility Supplies		\$255.21
PO#:	Voucher #:	14017	Invoice	Invoice No: 315937	4/28/2025	Paid Amt:	\$255.21
						Check Amount:	\$255.21
SHBC	18515	1258		Premier Kitchen, Inc.		Check	
			E 02	005 770 000 701 490	Lunch 09/01/24-09/15/24		\$2,308.24
			E 02	005 770 000 705 490	Breakfast 09/01/24-09/15/24		\$1,942.50
			E 02	005 770 000 701 401	Supplies		\$348.35
PO#:	Voucher #:	14020	Invoice	Invoice No: 38394	4/28/2025	Paid Amt:	\$4,599.09
			E 02	005 770 000 701 490	Lunch 04/01/25-04/15/25		\$4,764.40
			E 02	005 770 000 705 490	Breakfast 04/01/25-04/15/25		\$2,825.00
			E 02	005 770 000 701 401	Food Trays		\$390.00
PO#:	Voucher #:	14018	Invoice	Invoice No: 39610	4/28/2025	Paid Amt:	\$7,979.40

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	18515	1258		Premier Kitchen, Inc.		Check	
			E 02	005 770 000 701 401	Food Trays	\$195.00	
PO#:	Voucher #:	14019	Invoice	Invoice No: 39611	4/28/2025	Paid Amt:	\$195.00
						Check Amount:	\$12,773.49
SHBC	18516	1466		The McDowell Agency, INC		Check	
			E 01	005 110 000 000 305	Background Checks	\$75.00	
PO#:	Voucher #:	14023	Invoice	Invoice No: 160712	4/28/2025	Paid Amt:	\$75.00
						Check Amount:	\$75.00
Report Total:							\$105,853.48

# **SWAN RIVER MONTESSORI CHARTER SCHOOL**

## **School Board Meeting**

**Tuesday, April 15, 2025 at 2:30 p.m.**

The school board will hold this meeting in person at Swan River Montessori Charter School at 503 Maple St.

building. **Meeting Agenda**

### **I. CALL TO ORDER in 503 Kitchen at Swan River Montessori Charter School by Jana Evink @2:37 pm**

### **II. ROLL CALL**

- a. Board Members Present: Rick Freese, Clarie Belknap, Jana Evink, Julie Halvorson, Amy Savage, Amy Jensen
- b. Board Members Absent: none
- c. Other Attendees: Osprey Wilds representative, Annette Vemuri (school director), Bridget Peterson (EdFin accountant), Craig Kepler (lawyer)
- d. Recording Minutes : Amy Jensen

### **III. REVIEW OF SRMCS MISSION AND VISION STATEMENTS**

The mission of Swan River Montessori Charter School 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.

Swan River Montessori Charter School's vision is to employ an interdisciplinary 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.

### **IV. MEETING AGENDA-** Motion to approve meeting agenda made by Nicole Perez, Seconded by Claire Belknap. Board Vote- All "aye", Motion carries

### **V. DECLARATION OF CONFLICTS - none**

### **VI. FINANCIAL REPORT**

- a. March Financial Report – 75% through fiscal year, projected to end year with 28% fund balance, school in good financial standing

Motion to approve March financials made by AJ, Seconded by AS Board Vote- All "aye" Motion carries

- a. FY25 Enrollment Numbers as of 4.11.25

- i. Charter School (K-6) = 167
- ii. Children's House (EC) = 14
- iii. Pupil Unit Actual/Budget = 167/163

- b. Review of Bills-. reviewed
- c. Donations- – none

**VII. CONSENT AGENDA** - Motion to approve consent agenda made by CB, Seconded by RF. Board Vote- all aye, motion carries

- a. March Minutes
- b. Special Board meeting minutes 4.7.25
- c. Extended Care Enrollment for Children of SRMCS Staff Members
- d. Conflict of Interest Policy - moved to new business item d
- e. Use of Potassium Iodide (KI) in the Event of a Nuclear Accident Policy
- f. Crisis Management Policy- moved to new business item c

#### **VIII. ENVIRONMENTAL EDUCATION REPORT AS RELATED TO CONTRACTED GOAL**

#### **IX. ACADEMIC PERFORMANCE REPORT AS RELATED TO CONTRACTED GOALS –**

#### **X. DIRECTOR GOALS**

**XI. STRATEGIC PLANNING & GOAL SETTING** - Craig Kepler, lawyer hired by SRMCS, updated the board regarding a loan resolution with the City of Monticello, working on agreement to present to city. Motion to authorize Craig Kepler to negotiate the MCC use agreement with the City of Monticello made by AJ, Seconded by RF. Board Vote- all aye, motion carries

#### **XII. OLD BUSINESS**

- a. Compensation for substitute Teachers & Support Staff Policy - tabled until May

#### **XIII. NEW BUSINESS**

- a. Osprey Wilds – presentation for renewal
- b. List of Professional Development for Staff : CPR, Cultural Competency, Academics
- c. Crisis Management Policy- table to June
- d. Conflict of Interest Policy- reviewed, no changes

#### **XIV. REVIEW OF NEXT MEETING AGENDA**

- a. Date, Time & Location of next Board Meeting – **May 20, 2025 in the 503 building @ 2:30 pm**
- b. Upcoming Agenda Items

New Business  
Fy 26 Budget

Confirm Enrollment Projections  
School Board Elections Update  
Board Workshop

**XV. MOTION TO ADJOURN by Savage at 4:07 PM, Seconded by Freese. Board Vote- all in favor ' aye' ,  
motion carries**

**Swan River Montessori Charter School**  
**FY24 Academic Performance Evaluation**  
**Contract Period July 1, 2021 through June 30, 2026**

The Academic Performance Evaluation is conducted to determine progress on overall student achievement at the school as evidenced by the school's attainment of the contractual goals in the charter contract and the school's performance according to the state's accountability system – the North Star system. This evaluation is conducted annually and is designed to provide an update on the school's performance on contractual measures to date. In addition to the annual evaluations, a final academic performance evaluation is issued as part of the school's summative renewal evaluation in the last year of its charter contract.

For detailed information on the school's contractual goals, including performance rating criteria and World's Best Workforce alignment, refer to Exhibit G of the charter contract. All performance ratings presented in this evaluation are based upon currently available data. For comprehensive data by each performance measure, see the Academic Data Profile.

**Summary of Indicator Points**

Indicator	Points Possible	Points Earned	Performance Ranking	Percent Earned Through FY24	Percent Earned Through FY23
1: Mission Related Outcomes	10	10	Meets	100%	100.0%
2: English Language Learners	0	0	N/A	N/A	N/A
3: Reading Growth	22	19	Meets	86%	81.8%
4: Math Growth	22	3	Does Not Meet	14%	13.6%
5: Reading Proficiency	10	14	Exceeds	140%	135.0%
6: Math Proficiency	10	5.5	Approaches	55%	45.0%
7: Science Proficiency (and Growth)	8	8	Meets	100%	100.0%
8: Other Proficiency or Growth	12	10	Meets	83%	100.0%
9: Post-Secondary Readiness	N/A	0	N/A	N/A	N/A
10: Attendance	6	0	Does Not Meet	0%	0.0%
Overall	100	69.5	Eligible for Renewal*	70%	69.0%

*\*In line with Minnesota's ESSA waiver, and due to the effects of the COVID-19 pandemic on data collection and usability, MCA, ACCESS, and MTAS data collected during the 2020-21 school year will not be used for accountability purposes. To this end, Osprey Wilds will provide a FY21 academic evaluation to all schools, yet will use FY19 data to inform accountability decisions (i.e. renewal, etc.) until FY22 data becomes available.*

**Summary Analysis:** The school demonstrated mixed academic performance through FY24, with performance being essentially flat for most subjects though showing improvement in math performance. One indicator exceeded target (Reading Proficiency), four indicators met target (Mission Related Outcomes, Reading Growth, Science Proficiency and Growth, one indicator approached target (Math Proficiency), and two indicators did not meet target (Math Growth and Attendance). Areas of strength include Reading Proficiency, and Science Proficiency and Growth, with the school outperforming the state for all measures in both indicators, and outperforming the district for all measures in Reading Proficiency. Areas of concern include Math Growth and Math Proficiency, though results from FY24 were much stronger than the previous two years. In Math Growth, there were four measures that did not meet target. Math Proficiency was the only indicator whose performance level improved, moving from does not meet in FY23 to approaches in FY24. The school should continue to build on the success they have seen in their math outcomes.

Overall, the school earned 70% of points through FY24. Based on performance to date, the school is "Eligible for Renewal" per Exhibit P of the charter contract.

**Indicator 1: Mission Related**
**10 Points**

School Goal: 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			
		Points	Result
Performance Ratings	Measure 1.1: From FY21 to FY25, 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 "Montessori Planes of Development: Student Growth Assessment" rubric administered annually in the spring.	10	12.6
Exceeds Target (x 1.5)	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	10
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.		
* The assessment is also administered in the fall; however, only spring scores will be considered for this measure.		Points Possible	Points Earned
		10	100.0%

**Indicator 2: English Language Learners**

The school does not have points apportioned in this indicator area as it does not serve a significant population of English Learners.

**0 Points**

School Goal: Over the period of the contract, English Learners at SRMCS will demonstrate adequate progress towards English language proficiency.			
		Points	Result
Performance Ratings	Measure 2.1 [CCR]: From FY21 to FY26, the aggregate percentage of English Learners meeting target on the ACCESS test grades K-8 will be equal to or greater than that of the state percentage of English Learners meeting target.	0	
Exceeds Target (x 1.5)	The aggregate percentage is at least 10.0 percentage points greater than the state percentage of English Learners meeting target.		
Meets Target (x1.0)	The aggregate percentage is equal to or greater than the state percentage of English Learners meeting target.		
Approaches Target (x0.5)	The aggregate percentage is within 5.0 percentage points of the state percentage of English Learners meeting target.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result
Performance Ratings	Measure 2.2 [CCR]: From FY21 to FY26, the average progress toward target for English Learners grades K-12 on the ACCESS test will be equal to or greater than the state average progress toward target.	0	
Exceeds Target (x 1.5)	The aggregate percentage is least 10.0 percentage points over the state average progress toward target.		
Meets Target (x1.0)	The aggregate percentage equal to or greater than the state average progress toward target.		
Approaches Target (x0.5)	The aggregate percentage is within 5.0 percentage points of the state's average progress toward target.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Points
		0	0.0%

**Indicator 3: Reading Growth**
**22 Points**

School Goal: Over the period of the contract, students at SRMCS will demonstrate growth in reading as measured by state accountability tests.			
		Points	Result
Performance Ratings	Measure 3.1 [CCR]: In aggregate, from FY21-FY25, the overall percentage of students whose achievement level on the statewide assessments for reading (as measured by North Star Academic Progress) improved on statewide assessments is equal to or greater than the state percentage.	2	-2%
Exceeds Target (x 1.5)	The school achieves an overall percentage greater than 10 percentage points over that of the state.		
Meets Target (x1.0)	The school achieves an overall percentage equal to or greater than that of the state.		
Approaches Target (x0.5)	The school achieves an overall percentage that is within 10 percentage points of the state.	X	1
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result
Performance Ratings	Measure 3.2 [CCR]: In aggregate, from FY21-FY25, the overall percentage of students whose achievement level decreased or stayed "does not meet standards" on statewide assessments for reading (as measured by North Star Academic Progress) is equal to or less than the state.	6	-11%
Exceeds Target (x 1.5)	The school achieves an overall percentage at least 10 percentage points less than that of the state.	X	9
Meets Target (x1.0)	The school achieves an overall percentage less than or equal to that of the state.		
Approaches Target (x0.5)	The school achieves an overall percentage that is no more than 10 percentage points greater than that of the state.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result
Performance Ratings	Measure 3.3 [RG3]: For FY22-25, the aggregate average growth percentile from fall start score of students in grades 2-6 enrolled in SRM for both the fall and spring FAST aReading will be greater than 50%.	5	45%
Exceeds Target (x 1.5)	The aggregate average growth percentile will be greater than 60%		
Meets Target (x1.0)	The aggregate average growth percentile will be greater than 50%		
Approaches Target (x0.5)	The aggregate average growth percentile will be greater than 40%	X	2.5
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result
Performance Ratings	Measure 3.4 [RG3]: For FY22-FY25 in aggregate, greater than 50% of students in grades 2-6 enrolled in SRM for both the fall and spring FAST aReading will have a growth percentile from fall start score of greater than 50%.	5	44%
Exceeds Target (x 1.5)	In aggregate, over 60% of students will have a growth percentile greater than 50%.		
Meets Target (x1.0)	In aggregate, over 50% of students will have a growth percentile greater than 50%.		
Approaches Target (x0.5)	In aggregate, over 40% of students will have a growth percentile greater than 50%.	X	2.5
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result

Performance Ratings	Measure 3.5 [RG3]: For FY22-25, the average growth percentile from fall start score of students in grades K-1 enrolled in SRM for both the fall and spring FAST earlyReading will be greater than 50%.	2	49.6%
Exceeds Target (x 1.5)	The aggregate average growth percentile will be greater than 60%		
Meets Target (x1.0)	The aggregate average growth percentile will be greater than 50%	X	2
Approaches Target (x0.5)	The aggregate average growth percentile will be greater than 40%		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result
Performance Ratings	Measure 3.6 [RG3]: For FY22-FY25, greater than 50% of students in grades K-1 enrolled in SRM for both the fall and spring FAST earlyReading will have a growth percentile from fall start score of greater than 50%.	2	51%
Exceeds Target (x 1.5)	In aggregate, over 60% of students will have a growth percentile greater than 50%.		
Meets Target (x1.0)	In aggregate, over 50% of students will have a growth percentile greater than 50%.	X	2
Approaches Target (x0.5)	In aggregate, over 40% of students will have a growth percentile greater than 50%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points Possible	Points Earned % Earned
		22	19 86.4%

#### Indicator 4: Math Growth

22 Points

School Goal: Over the period of the contract, students at SRMCS will demonstrate growth in math as measured by state accountability tests.			
		Points	Result
Performance Ratings	Measure 4.1 [CCR]: In aggregate, from FY21-FY25, the overall percentage of students whose achievement level on the statewide assessments for math (as measured by North Star Academic Progress) improved on statewide assessments is equal to or greater than the state percentage.	2	-11%
Exceeds Target (x 1.5)	The school achieves an overall percentage greater than 10 percentage points over that of the state.		
Meets Target (x1.0)	The school achieves an overall percentage equal to or greater than that of the state.		
Approaches Target (x0.5)	The school achieves an overall percentage that is within 10 percentage points of the state.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	X	0
		Points	Result
Performance Ratings	Measure 4.2 [CCR]: In aggregate, from FY21-FY25, the overall percentage of students whose achievement level decreased or stayed "does not meet standards" on statewide assessments for math (as measured by North Star Academic Progress) is equal to or less than the state.	6	22%
Exceeds Target (x 1.5)	The school achieves an overall percentage at least 10 percentage points less than that of the state.		
Meets Target (x1.0)	The school achieves an overall percentage less than or equal to that of the state.		
Approaches Target (x0.5)	The school achieves an overall percentage that is no more than 10 percentage points greater than that of the state.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	X	0
		Points	Result
Performance Ratings	Measure 4.3 [RG3]: For FY22-25, the average growth percentile from fall start score of students in grades 2-6 enrolled in SRM for both the fall and spring FAST aMath will be greater than 50%.	5	38%
Exceeds Target (x 1.5)	The aggregate average growth percentile will be greater than 60%		
Meets Target (x1.0)	The aggregate average growth percentile will be greater than 50%		
Approaches Target (x0.5)	The aggregate average growth percentile will be greater than 40%		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	X	0
		Points	Result
Performance Ratings	Measure 4.4 [RG3]: For FY22-25, greater than 50% of students in grades 2-6 enrolled in SRM for both the fall and spring FAST aMath will have a growth percentile from fall start score of greater than 50%.	5	31%
Exceeds Target (x 1.5)	In aggregate, over 60% of students will have a growth percentile greater than 50%.		
Meets Target (x1.0)	In aggregate, over 50% of students will have a growth percentile greater than 50%.		
Approaches Target (x0.5)	In aggregate, over 40% of students will have a growth percentile greater than 50%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	X	0
		Points	Result
Performance Ratings	Measure 4.5 [RG3]: For FY22-25, the average growth percentile from fall start score of students in grades K-1 enrolled in SRM for both the fall and spring FAST earlyMath will be greater than 50%.	2	55%
Exceeds Target (x 1.5)	The aggregate average growth percentile will be greater than 60%		
Meets Target (x1.0)	The aggregate average growth percentile will be greater than 50%	X	2
Approaches Target (x0.5)	The aggregate average growth percentile will be greater than 40%		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result
Performance Ratings	Measure 4.6 [RG3]: For FY22-25, greater than 50% of students in grades K-1 enrolled in SRM for both the fall and spring FAST earlyMath will have a growth percentile from fall start score of greater than 50%.	2	47%
Exceeds Target (x 1.5)	In aggregate, over 60% of students will have a growth percentile greater than 50%.		
Meets Target (x1.0)	In aggregate, over 50% of students will have a growth percentile greater than 50%.		
Approaches Target (x0.5)	In aggregate, over 40% of students will have a growth percentile greater than 50%.	X	1
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points Possible	Points Earned % Earned
		22	3 13.6%

#### Indicator 5: Reading Proficiency

10 Points



School Goal: Over the period of the contract, students at SRMCS will demonstrate proficiency in reading as measured by state accountability tests and nationally normed assessments.				
		Points	Result	
Performance Ratings	Measure 5.1 [RG3]: From FY21 to FY25, the school’s aggregate proficiency index score for students in grade 3 will be equal to or greater than that of the state for the same grade (3).	1	16	
Exceeds Target (x 1.5)	The school’s aggregate proficiency index score is at least 10.0 points above the state’s score.	X	1.5	
Meets Target (x1.0)	The school’s aggregate proficiency index score is equal to or 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.			
		Points	Result	
Performance Ratings	Measure 5.2 [RG3]: From FY21 to FY25, the school’s aggregate proficiency index score for students in grade 3 is equal to or greater than the resident district (ISD 882 – Monticello) for the same grade (3).	1	10	
Exceeds Target (x 1.5)	The school’s aggregate proficiency index score is at least 10.0 points above the resident district’s score.	X	1.5	
Meets Target (x1.0)	The school’s aggregate proficiency index score is equal to or greater than the resident district’s score.			
Approaches Target (x0.5)	The school’s aggregate proficiency index score is within 5.0 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.			
		Points	Result	
Performance Ratings	Measure 5.3 [CCR]: From FY21 to FY25, the school’s aggregate proficiency index score for students in grades 4-6 will be equal to or greater than that of the state for the same grades (4-6).	2	12	
Exceeds Target (x 1.5)	The school’s aggregate proficiency index score is at least 10.0 points greater than the state’s score.	X	3	
Meets Target (x1.0)	The school’s aggregate proficiency index score is equal to or 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.			
		Points	Result	
Performance Ratings	Measure 5.4 [CCR]: From FY21 to FY25, the school’s aggregate proficiency index score for students in grades 4-6 equal to or greater than the resident district (ISD 882 – Monticello) for the same grades (4-6).	2	3	
Exceeds Target (x 1.5)	The school’s aggregate proficiency index score is at least 10.0 points above the resident district’s score.			
Meets Target (x1.0)	The school’s aggregate proficiency index score is equal to or greater the resident district’s score.	X	2	
Approaches Target (x0.5)	The school’s aggregate proficiency index score is within 5.0 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.			
		Points	Result	
Performance Ratings	Measure 5.5 [AGC]: From FY21 to FY25, the school’s aggregate proficiency index score for students in the Special Education group will be equal to or greater than that of the state for the same group and the same grades (3-6).	2	30	
Exceeds Target (x 1.5)	The school’s aggregate proficiency index score at least 10.0 points above the state’s score.	X	3	
Meets Target (x1.0)	The school’s aggregate proficiency index score is equal to or 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.			
		Points	Result	
Performance Ratings	Measure 5.6 [AGC]: From FY21 to FY25, the school’s aggregate proficiency index score for students in the Special Education group will be equal to or greater than the resident district (ISD 882 – Monticello) for the same group and the same grades (3-6).	2	27	
Exceeds Target (x 1.5)	The school’s aggregate proficiency index score is at least 10.0 points above the resident district’s score.	X	3	
Meets Target (x1.0)	The school’s aggregate proficiency index score is equal to or greater than the resident district’s score.			
Approaches Target (x0.5)	The school’s aggregate proficiency index score is within 5.0 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.			
		Points Possible	Points Earned	% Earned
		10	14	140.0%

## Indicator 6: Math Proficiency

10 Points

School Goal: Over the period of the contract, students at SRMCS will demonstrate proficiency in math as measured by state accountability tests and nationally normed assessments.			
		Points	Result
Performance Ratings	Measure 6.1 [CCR]: From FY21 to FY25, the school's aggregate proficiency index score for students in grades 3-6 will be equal to or greater than that of the state for the same grades (3-6).	3	-1
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points greater than the state's score.		
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or 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.	X	1.5
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	Result
Performance Ratings	Measure 6.2 [CCR]: From FY21 to FY25, the school's aggregate proficiency index score for students in grades 3-6 will be equal to or greater than the resident district (ISD 882 – Monticello) for the same grades (3-6).	3	-12
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the resident district's score.		
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the resident district's score.		
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5.0 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	0
		Points	Result
Performance Ratings	Measure 6.3 [CCR]: In aggregate, from FY21 to FY25, the school's aggregate proficiency index score for Special Education student group will be greater than that of the state for the same student group and the same grades (3-6)..	2	7
Exceeds Target (x 1.5)	The school achieves an aggregate proficiency index score at least 10.0 points above the state's score.		
Meets Target (x1.0)	The school achieves an aggregate proficiency index score is greater than the state's score.	X	2

<b>Approaches Target (x0.5)</b>	The school achieves an aggregate proficiency index score is within 5.0 points of the state's score.		
<b>Does Not Meet Target (x0.0)</b>	The school did not meet the criteria for any of the ratings above.		
		<b>Points</b>	<b>Result</b>
<b>Performance Ratings</b>	<b>Measure 6.4 [AGC]: From FY21 to FY25, the school's aggregate proficiency index score for the Special Education student group will be equal to or greater than the resident district (ISD 882 – Monticello) for the same group and the same grades (3-6).</b>	2	1
<b>Exceeds Target (x 1.5)</b>	The school's aggregate proficiency index score is at least 10.0 points above the resident district's score.		
<b>Meets Target (x1.0)</b>	The school's aggregate proficiency index score is equal to or greater than the resident district's score.	X	2
<b>Approaches Target (x0.5)</b>	The school's aggregate proficiency index score is within 5.0 points of the resident district's score.		
<b>Does Not Meet Target (x0.0)</b>	The school did not meet the criteria for any of the ratings above.		
		<b>Points Possible</b>	<b>Points Earned</b>
		10	5.5
			<b>% Earned</b>
			55.0%

## Indicator 7: Science Proficiency

8 Points

<b>School Goal: Over the period of the contract, students at SRMCS will demonstrate proficiency in science as measured by state accountability tests.</b>			
		<b>Points</b>	<b>Result</b>
<b>Performance Ratings</b>	<b>Measure 7.1 [CCR]: From FY21 to FY25, the school's aggregate proficiency index score for students in grade 5 will be equal to or greater than that of the state for the same grade (5).</b>	4	10
<b>Exceeds Target (x 1.5)</b>	The school's aggregate proficiency index score is at least 10.0 points greater than the state's score.	X	6
<b>Meets Target (x1.0)</b>	The school's aggregate proficiency index score is equal to or greater than the state's score.		
<b>Approaches Target (x0.5)</b>	The school's aggregate proficiency index score is within 5.0 points of the state's score.		
<b>Does Not Meet Target (x0.0)</b>	The school did not meet the criteria for any of the ratings above.		
		<b>Points</b>	<b>Result</b>
<b>Performance Ratings</b>	<b>Measure 7.2 [CCR]: From FY21 to FY25, the school's aggregate proficiency index score for students in grade 5 will be equal to or greater than the resident district (ISD 882 – Monticello) for the same grade (5).</b>	4	-3
<b>Exceeds Target (x 1.5)</b>	The school's aggregate proficiency index score is at least 10.0 points above the resident district's score.		
<b>Meets Target (x1.0)</b>	The school's aggregate proficiency index score is equal to or greater than the resident district's score.		
<b>Approaches Target (x0.5)</b>	The school's aggregate proficiency index score is within 5.0 points of the resident district's score.	X	2
<b>Does Not Meet Target (x0.0)</b>	The school did not meet the criteria for any of the ratings above.		
		<b>Points Possible</b>	<b>Points Earned</b>
		8	8
			<b>% Earned</b>
			100.0%

## Indicator 8: Proficiency in Other Curricular Areas

12 Points

<b>School Goal: 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 and Over the period of the contract, students at SRMCS will demonstrate growth in writing as measured by a locally-developed assessment rubric.</b>			
		<b>Points</b>	<b>Result</b>
<b>Performance Ratings</b>	<b>Measure 8.1 [R4K]: From FY21 to FY26, 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%.</b>	2	78%
<b>Exceeds Target (x1.5)</b>	The aggregate percentage is at least 95%.		
<b>Meets Target (x1.0)</b>	The aggregate percentage is at least 85%.		
<b>Approaches Target (x0.5)</b>	The aggregate percentage is at least 80%.		
<b>Does Not Meet Target (x0.0)</b>	The school did not meet the criteria for any of the ratings above.	X	0
		<b>Points</b>	<b>Result</b>
<b>Performance Ratings</b>	<b>Measure 8.2 [CCR]: From FY21 to FY26, 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 E1 First Grade, E1 Second &amp; Third Grade, and E2 Writing Assessment rubrics will be at least 90%.</b>	10	93%
<b>Exceeds Target (x1.5)</b>	The aggregate percentage is at least 95%.		
<b>Meets Target (x1.0)</b>	The aggregate percentage is at least 90%.	X	10
<b>Approaches Target (x0.5)</b>	The aggregate percentage is at least 80%.		
<b>Does Not Meet Target (x0.0)</b>	The school did not meet the criteria for any of the ratings above.		
<i>*School provided the result, but not the corresponding data for verification</i>		<b>Points Possible</b>	<b>Points Earned</b>
		12	10
			<b>% Earned</b>
			83.3%

## Indicator 9: Post-Secondary Readiness

N/A Points

The school does not have a contractual goal in this indicator area as it does not serve high school students.

## Indicator 10: Attendance

6 Points

<b>School Goal: Over the period of the contract, students at SRMCS will attend the school at high rates.</b>			
		<b>Points</b>	<b>Result</b>

Performance Ratings	Measure 10.1: From FY21-FY25, the average of the school's annual consistent attendance rates is equal to or greater than 92%.	6	77%
Exceeds Target (x 1.5)	The average of the school's consistent attendance rates is at least 96.0%.		
Meets Target (x1.0)	The average of the school's consistent attendance rates is at least 92.0%.		
Approaches Target (x0.5)	The average of the school's annual attendance rates is at least 90.0%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	X	0
		Points Possible	Points Earned
		6	0
		% Earned	
		0.0%	

## Swan River Montessori

### Indicator 1: Mission Related Outcomes

#### Measure 1.1 Performance Data:

Montessori Planes of Development – Local Assessment Rubric, Grades K-6

Swan River Montessori Charter School	Average Score	Total Possible	Number of Students
FY21			
FY22			
FY23	12.5	16	
FY24	12.6	16	
FY25			
Aggregate	12.6	16	

Data Source: Data provided to OW by school

### Indicator 3: Reading Growth

#### Measure 3.1 Performance Data:

Reading: North Star Academic Progress – All Students (Meeting enrollment criteria)

Swan River Montessori	Count whose	Count tested	Percent of
FY21*			
FY22	4	28	14.3%
FY23	8	49	16.3%
FY24	9	48	18.8%
FY25			
Aggregate	21	125	16.8%

Source: Requested data provided to OW by school

Reading: North Star Academic Progress – All Students (Meeting enrollment criteria)

State of Minnesota	Count whose	Count tested	Percent of
FY21*			
FY22	49599	245117	20.2%
FY23	51212	284046	18.0%
FY24	55303	289929	19.1%
FY25			
Aggregate	156114	819092	19.1%

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

#### Measure 3.2 Performance Data:

Reading: North Star Academic Progress – All Students (Meeting enrollment criteria)

Swan River Montessori	Count whose	Count tested	Percent of
FY21*			
FY22	10	28	35.7%
FY23	13	49	26.5%
FY24	12	48	25.0%
FY25			
Aggregate	35	125	28.0%

Source: Requested data provided to OW by school

Reading: North Star Academic Progress – All Students (Meeting enrollment criteria)

State of Minnesota	Count whose	Count tested	Percent of
FY21*			
FY22	90144	245117	36.8%
FY23	113661	284046	40.0%
FY24	113049	289929	39.0%
FY25			
Aggregate	316854	819092	38.7%

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

#### Measure 3.3 Performance Data:

Reading: FAST aReading Assessment – Fall to Spring, All students (Meeting enrollment criteria, Grades 2-6)

Swan River Montessori	Total Count	Average growth
FY21	93	42.0%
FY22	113	47.6%
FY23	110	44.3%
FY24	102	46.8%
FY25		
Aggregate	418	45.2%

Source: Requested data provided to OW by school

#### Measure 3.4 Performance Data:

Reading: FAST aReading Assessment – Fall to Spring, All students (Meeting enrollment criteria, Grades 2-6)

Swan River Montessori	Count with	Total Count	Percent with
FY21	40	93	43.0%
FY22	55	113	48.7%
FY23	46	110	41.8%
FY24	43	102	42.2%
FY25			
Aggregate	184	418	44.0%

Source: Requested data provided to OW by school

\*Excluding students that exceed grade level for both the fall and the spring tests

**Measure 3.5 Performance Data:**

**Reading: FAST aReading Assessment – Fall to Spring, All students (Meeting enrollment criteria, Grades K-1)**

Swan River Montessori	Total Count	Average growth
FY21	55	46.6%
FY22	50	44.9%
FY23	50	56.0%
FY24	46	50.7%
FY25		
<b>Aggregate</b>	<b>201</b>	<b>49.6%</b>

Source: Requested data provided to OW by school

**Measure 3.6 Performance Data:**

**Reading: FAST aReading Assessment – Fall to Spring, All students (Meeting enrollment criteria, Grades K-1)**

Swan River Montessori	Count with	Total Count	Percent with
FY21	25	55	45.5%
FY22	23	50	46.0%
FY23	30	50	60.0%
FY24	24	46	52.2%
FY25			
<b>Aggregate</b>	<b>102</b>	<b>201</b>	<b>50.7%</b>

Source: Requested data provided to OW by school

**Indicator 4: Math Growth**

**Measure 4.1 Performance Data:**

**Math: North Star Academic Progress -- All Students (Meeting enrollment criteria)**

Swan River Montessori	Count whose	Count tested	Percent of
FY21*			
FY22	1	28	3.6%
FY23	1	48	2.1%
FY24	4	50	8.0%
FY25			
<b>Aggregate</b>	<b>6</b>	<b>126</b>	<b>4.8%</b>

Source: Requested data provided to OW by school

**Math: North Star Academic Progress -- All Students (Meeting enrollment criteria)**

State of Minnesota	Count whose	Count tested	Percent of
FY21*			
FY22	44136	241968	18.2%
FY23	41951	282652	14.8%
FY24	41023	288827	14.2%
FY25			
<b>Aggregate</b>	<b>127110</b>	<b>813447</b>	<b>15.6%</b>

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

**Measure 4.2 Performance Data:**

**Math: North Star Academic Progress -- All Students (Meeting enrollment criteria)**

Swan River Montessori	Count whose	Count tested	Percent of
FY21*			
FY22	18	28	64.3%
FY23	36	49	73.5%
FY24	28	50	56.0%
FY25			
<b>Aggregate</b>	<b>82</b>	<b>127</b>	<b>64.6%</b>

Source: Requested data provided to OW by school

\*All students if enrollment criteria is not calculated

**Math: North Star Academic Progress -- All Students (Meeting enrollment criteria)**

State of Minnesota	Count whose	Count tested	Percent of
FY21*			
FY22	96749	241968	40.0%
FY23	123370	282652	43.6%
FY24	125819	288827	43.6%
FY25			
<b>Aggregate</b>	<b>345938</b>	<b>813447</b>	<b>42.5%</b>

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

**Measure 4.3 Performance Data:**

**Math: FAST aMath Assessment – Fall to Spring, All students (Meeting enrollment criteria, Grades 2-6)**

Swan River Montessori	Total Count	Average growth
FY21	93	41.1%
FY22	114	32.3%
FY23	107	32.1%
FY24	101	46.1%
FY25		
<b>Aggregate</b>	<b>415</b>	<b>37.9%</b>

Source: Requested data provided to OW by school

**Measure 4.4 Performance Data:**

**Math: FAST aMath Assessment – Fall to Spring All students (Meeting enrollment criteria, Grades 2-6)**

Swan River Montessori	Count with	Total Count	Percent with
FY21	35	93	37.6%
FY22	28	114	24.6%
FY23	21	107	19.6%
FY24	46	101	45.5%
FY25			
<b>Aggregate</b>	<b>130</b>	<b>415</b>	<b>31.3%</b>

Source: Requested data provided to OW by school

\*Excluding students that exceed grade level for both the fall and the spring tests

**Measure 4.5 Performance Data:**

**Math: FAST aMath Assessment – Fall to Spring, All students (Meeting enrollment criteria, Grades K-1)**

Swan River Montessori Charter School	Count with growth percentile from fall score of greater than 50%	Total Count	Percent with growth percentile from fall start score of greater than 50%
FY21			
FY22	31	50	62.0%
FY23	26	47	55.3%
FY24	21	45	46.7%
FY25			
Aggregate	78	142	54.9%

Source: Requested data provided to OW by school

Swan River Montessori Charter School	Total Count Tested	Average growth percentile
FY21	55	42.2%
FY22	50	57.8%
FY23	47	52.8%
FY24	45	45.9%
FY25		
Aggregate	197	49.7%

**Measure 4.6 Performance Data:**

**Math: FAST aMath Assessment – Fall to Spring, All students (Meeting enrollment criteria, Grades K-1)**

Swan River Montessori Charter School	Count with growth percentile from fall score of greater than 50%	Total Count	Percent with growth percentile from fall start score of greater than 50%
FY21			
FY22	22	55	40.0%
FY23	26	47	55.3%
FY24	21	45	46.7%
FY25			
Aggregate	69	147	46.9%

Source: Requested data provided to OW by school

**Indicator 5: Reading Proficiency**

**Measures 5.1-5.2 Performance Data:**

**Reading: All State Accountability Tests – All Students (Meeting enrollment criteria, Grade 3)**

Swan River Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
FY21*	2	12	1	2	17	85.3
FY22	6	5	5	5	21	64.3
FY23	4	10	8	3	25	72.0
FY24	2	13	5	5	25	70.0
FY25					0	
Aggregate	14	40	19	15	88	72.2

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
FY21*	5,613	20,085	8,522	18,789	53,009	56.5
FY22	6,790	21,935	9,403	20,756	58,884	56.8
FY23	6,630	21,858	9,584	21,319	59,391	56.0
FY24	6,246	21,751	9,635	21,579	59,211	55.4
FY25					0	
Aggregate	25,279	85,629	37,144	82,443	230,495	56.2

Monticello Public (ISD 882)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY21*	26	128	42	68	264	66.3
FY22	27	115	44	66	252	65.1
FY23	30	126	55	85	296	62.0
FY24	24	112	52	95	283	57.2
FY25					0	
Aggregate	107	481	193	314	1,095	62.5

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

**Measures 5.3-5.4 Performance Data:**

**Reading: All State Accountability Tests – All Students (Meeting enrollment criteria, Grades 4-6)**

Swan River Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
FY21*	6	16	6	2	30	83.3
FY22	3	21	8	6	38	73.7
FY23	2	12	5	2	21	78.6
FY24	9	40	17	11	77	74.7
FY25					0	
Aggregate	20	89	36	21	166	76.5

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
FY21*	24,555	61,762	33,308	38,425	158,050	65.2
FY22	28,687	69,344	36,720	43,277	178,028	65.4
FY23	27,200	68,147	35,958	45,143	176,448	64.2
FY24	28,783	69,423	37,147	46,093	181,446	64.4

<b>FY25</b>					0	
<b>Aggregate</b>	109,225	268,676	143,133	172,938	693,972	64.8

Monticello Public (ISD 882)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
<b>FY21*</b>	139	385	160	147	831	72.7
<b>FY22</b>	149	423	163	117	852	76.7
<b>FY23</b>	131	356	162	136	785	72.4
<b>FY24</b>	141	395	150	147	833	73.3
<b>FY25</b>					0	
<b>Aggregate</b>	560	1,559	635	547	3,301	73.8

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

#### Measures 5.5-5.6 Performance Data:

##### Reading: All State Accountability Tests – Special Education (Meeting enrollment criteria, Grades 3-6)

Swan River Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
<b>FY21*</b>	2	6	3	2	13	73.1
<b>FY22</b>	1	4	2	4	11	54.5
<b>FY23</b>	2	5	1	5	13	57.7
<b>FY24</b>	1	8	4	1	14	78.6
<b>FY25</b>					0	
<b>Aggregate</b>	6	23	10	12	51	66.7

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
<b>FY21*</b>	2,242	7,071	5,602	19,011	33,926	35.7
<b>FY22</b>	3,099	8,978	6,903	22,288	41,268	37.6
<b>FY23</b>	2,844	8,626	6,378	23,129	40,977	35.8
<b>FY24</b>	3,037	9,015	7,018	24,594	43,664	35.6
<b>FY25</b>					0	
<b>Aggregate</b>	11,222	33,690	25,901	89,022	159,835	36.2

Monticello Public (ISD 882)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
<b>FY21*</b>	6	44	18	79	147	40.1
<b>FY22</b>	13	47	37	78	175	44.9
<b>FY23</b>	12	38	26	86	162	38.9
<b>FY24</b>	15	34	31	103	183	35.2
<b>FY25</b>					0	
<b>Aggregate</b>	46	163	112	346	667	39.7

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

#### Indicator 6: Math Proficiency

#### Measures 6.1-6.2 Performance Data:

##### Math: All State Accountability Tests – All Students (Meeting enrollment criteria, Grades 3-6)

Swan River Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
<b>FY21*</b>	10	10	19	6	45	65.6
<b>FY22</b>	9	18	14	18	59	57.6
<b>FY23</b>	10	24	19	26	79	55.1
<b>FY24</b>	5	34	18	20	77	62.3
<b>FY25</b>					0	
<b>Aggregate</b>	34	86	70	70	260	59.6

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
<b>FY21*</b>	34,558	64,678	46,165	64,122	209,523	58.4
<b>FY22</b>	43,786	74,465	49,130	68,856	236,237	60.5
<b>FY23</b>	44,997	74,269	48,973	67,215	235,454	61.1
<b>FY24</b>	46,271	75,632	50,466	67,952	240,321	61.2
<b>FY25</b>					0	
<b>Aggregate</b>	169,612	289,044	194,734	268,145	921,535	60.3

Monticello Public (ISD 882)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
<b>FY21*</b>	240	391	235	221	1,087	68.9
<b>FY22</b>	274	449	193	187	1,103	74.3
<b>FY23</b>	258	401	223	188	1,070	72.0
<b>FY24</b>	238	425	238	209	1,110	70.5
<b>FY25</b>					0	
<b>Aggregate</b>	1,010	1,666	889	805	4,370	71.4

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

#### Measures 6.3-6.4 Performance Data:

##### Math: All State Accountability Tests – Special Education (Meeting enrollment criteria, Grades 3-6)

Swan River Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
<b>FY21*</b>	4	2	5	1	12	70.8
<b>FY22</b>	0	2	1	8	11	22.7
<b>FY23</b>	0	4	2	9	15	33.3
<b>FY24</b>	0	6	2	5	13	53.8
<b>FY25</b>					0	
<b>Aggregate</b>	4	14	10	23	51	45.1

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
<b>FY21*</b>	2,638	6,438	5,788	18,862	33,726	35.5
<b>FY22</b>	3,742	8,674	7,192	21,587	41,195	38.9
<b>FY23</b>	3,940	8,341	7,122	21,601	41,004	38.6

FY24	4,174	8,916	7,673	22,913	43,676	38.8
FY25					0	
Aggregate	14,494	32,369	27,775	84,963	159,601	38.1

Monticello Public (ISD 882)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY21*	12	33	21	77	143	38.8
FY22	17	53	22	84	176	46.0
FY23	23	33	32	76	164	43.9
FY24	18	46	36	82	182	
FY25					0	
Aggregate	70	165	111	319	665	43.7

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

#### Indicator 7: Science Proficiency (and Growth)

Measures 7.1-7.2 Performance Data:

Science: All State Accountability Tests – All Students (Meeting enrollment criteria, Grade 5)

Swan River Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
FY21*	1	5	6	0	12	75.0
FY22	1	7	3	2	13	73.1
FY23	1	7	12	1	21	66.7
FY24	0	10	9	3	22	65.9
FY25					0	
Aggregate	3	29	30	6	68	69.1

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
FY21*	3,960	21,160	12,788	14,524	52,432	60.1
FY22	4,507	25,551	13,216	16,893	60,167	60.9
FY23	5,473	23,484	13,623	17,239	59,819	59.8
FY24	4,026	23,669	14,950	18,874	61,519	57.2
FY25					0	
Aggregate	17,966	93,864	54,577	67,530	233,937	59.5

Monticello Public (ISD 882)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY21*	29	151	68	43	291	73.5
FY22	26	139	63	44	272	72.2
FY23	25	138	63	45	271	71.8
FY24	24	138	55	49	266	71.2
FY25					0	
Aggregate	104	566	249	181	1,100	72.2

Source: MDE Data Center

\*All students if enrollment criteria is not calculated

#### Indicator 8: Proficiency or Growth in Other Curricular Areas or Educational Programs

Measure 8.1 Performance Data:

Kindergarten Readiness Standards – Kindergarten Readiness Checklist

Swan River Montessori Charter School	Total Number of Preschoolers Entering Kindergarten	Numbers of Students Meeting Standards	Percent of Students Meeting Standards
FY21			
FY22			
FY23	7	6	85.7%
FY24	11	8	72.7%
FY25			
FY26			
Aggregate	18	14	77.8%

Data Source: Data provided to OW by school

Measure 8.2 Performance Data:

Writing Growth – Local Assessment Rubric, All students (Meeting enrollment criteria, Grades 1-6)

Swan River Montessori	Total Number of	Number of	Number of	Number of	Percent of
FY21					
FY22					
FY23	117	109	26	109	93.2%
FY24	126	117	54	117	92.9%
FY25					
FY26					
Aggregate	243	226	80	226	93.0%

Data Source: Data provided to OW by school

#### Indicator 10: Attendance

Measure 10.1 Performance Data:

Swan River Montessori	Count	Total	Annual
FY21**			
FY22	98	127	77.2%
FY23	102	132	77.3%
FY24			
FY25			
Average	200	259	77%

Data Source: Data provided to OW by school

\*\*Consistent attendance rate not reported by the state





	<i>FY24 - Actual</i>	<i>FY25 - Adopted</i>	<i>FY25 - Revised</i>	<i>FY26</i>	<i>Difference FY25 Revised &amp; FY26</i>	<i>FY27</i>	<i>FY28</i>
<b>Enrollment</b>							
Full Day K	18	25	25	27	2	25	27
1	27	24	24	25	1	25	24
2	23	26	26	27	1	27	26
3	28	26	26	26	0	26	26
4	29	26	26	26	0	26	26
5	26	26	26	26	0	26	26
6	5	10	10	8	-2	10	10
<b>Total ADM</b>	<b>156</b>	<b>163</b>	<b>163</b>	<b>165</b>	<b>2</b>	<b>165</b>	<b>165</b>
<b>Total Pupil Unit</b>	<b>156</b>	<b>163</b>	<b>163</b>	<b>165</b>	<b>2</b>	<b>165</b>	<b>165</b>
<b>REVENUES</b>							
<b>State Aid</b>							
General Aid	\$1,229,106	\$1,251,734	\$1,244,732	\$1,292,881	\$48,150	\$1,317,566	\$1,342,745
Compensatory	23,432	46,511	46,511	49,171	2,660	49,171	49,171
Lease Aid	204,708	214,182	216,810	157,120	(59,690)	157,120	157,120
Special Ed	842,000	692,156	776,706	738,401	(38,305)	761,552	788,814
Literacy Incentive Aid	17,793	17,793	20,103	17,793	(2,310)	17,793	17,793
Hourly Worker Unemployment	29,663	29,663	37,574	37,574	0	37,574	37,574
School Library Aid - Charter	20,000	19,944	20,000	20,000	0	20,000	20,000
Student Support - Charter	20,000	19,304	20,000	20,000	0	20,000	20,000
<b>Total State Aid</b>	<b>2,386,702</b>	<b>2,291,288</b>	<b>2,382,436</b>	<b>2,332,941</b>	<b>-49,495</b>	<b>2,380,776</b>	<b>2,433,217</b>
<b>Federal Aid</b>							
Title	\$18,751	\$17,644	\$24,114	\$24,114	\$0	\$24,654	\$24,901
Special Ed	0	1,863	124	124	0	127	128
Federal Special Education Aid	25,618	24,585	22,132	22,132	0	22,628	22,854
Federal Special Ed Aid - Preschool Age	0	202	0	0	0	0	0
CEIS Sped Regular	4,521	4,374	4,056	4,056	0	4,147	4,188
Expand Summer Learning	20,490	0	0	0	0	0	0
<b>Total Federal</b>	<b>69,380</b>	<b>48,669</b>	<b>50,426</b>	<b>50,426</b>	<b>0</b>	<b>51,555</b>	<b>52,071</b>
<b>Local Aid and Donation</b>							
MA Billing	6,526	\$0	\$0	\$0	\$0	\$0	\$0
Interest	6,061	500	500	500	0	500	500
Donations & other	7,550	10,000	10,000	10,000	0	10,000	10,000
Miscellaneous Revenue	5,677	400	400	400	0	400	400
Fees for Service	14,935	8,000	8,000	8,000	0	8,000	8,000
<b>Total Other Revenue</b>	<b>40,749</b>	<b>18,900</b>	<b>18,900</b>	<b>\$18,900</b>	<b>\$0</b>	<b>\$18,900</b>	<b>\$18,900</b>
<b>General Fund Revenue</b>	<b>\$2,496,831</b>	<b>\$2,358,856</b>	<b>\$2,451,762</b>	<b>2,402,267</b>	<b>-49,495</b>	<b>2,451,232</b>	<b>2,504,187</b>
<b>Food Service Revenue</b>							
Fees	\$138	\$0	\$0	\$0	\$0	\$0	\$0
Federal Revenue	55,141	137,134	82,000	82,820	820	83,648	84,485
State Revenue	78,038	0	35,000	35,350	350	35,704	36,061
Fund Balance Transfers	0	16,098	23,840	13,741	-10,099	13,879	14,017
<b>Food Service Revenue</b>	<b>\$133,317</b>	<b>\$153,232</b>	<b>\$140,840</b>	<b>\$131,911</b>	<b>-\$8,929</b>	<b>\$133,230</b>	<b>\$134,563</b>

SWAN RIVER MONTESSORI CHARTER SCHOOL FY26 BUDGET  
SCHOOL BOARD APPROVAL 5/20/2025

5/16/2025

	<i>FY24 - Actual</i>	FY25 - Adopted	FY25 - Revised	<i>FY26</i>	Difference FY25 Revised & FY26	FY27	FY28
<b>Community Service Revenue</b>							
Before/ After School Care - Extended Care	<i>\$47,598</i>	\$48,000	\$40,800	<i>\$40,800</i>	\$0	\$41,208	\$41,620
Preschool Tuition - Children's House	<i>94,624</i>	84,825	84,825	<i>84,825</i>	0	85,673	86,530
<b>Community Service Revenue</b>	<b><i>\$142,222</i></b>	<b>\$132,825</b>	<b>\$125,625</b>	<b><i>125,625</i></b>	<b>0</b>	<b>126,881</b>	<b>128,150</b>
<b>TOTAL REVENUE - SCHOOLWIDE</b>	<b><i>\$2,772,370</i></b>	<b>\$2,644,913</b>	<b>\$2,718,227</b>	<b><i>\$2,659,803</i></b>	<b>-\$58,424</b>	<b>\$2,711,343</b>	<b>\$2,766,900</b>
<b>EXPENSES</b>							
<b>Administration &amp; Operations</b>							
100 Salaries	<i>\$121,634</i>	\$124,009	\$123,989	<i>\$119,397</i>	-\$4,592	\$121,785	\$124,221
200 Benefits	<i>29,558</i>	31,523	30,997	<i>31,869</i>	871	34,131	36,555
Add: Family Leave 1/1/2026	<i>0</i>	0	0	<i>5,092</i>	5,092	10,388	10,596
305 Contracted Services	<i>139,799</i>	138,933	170,000	<i>158,500</i>	-11,500	166,425	174,746
320 Communication	<i>5,400</i>	5,854	5,854	<i>5,971</i>	117	6,090	6,212
329 Postage	<i>216</i>	878	878	<i>896</i>	18	914	932
330 Utilities	<i>33,490</i>	37,316	37,316	<i>39,182</i>	1,866	41,141	43,198
340 Insurance	<i>23,250</i>	24,411	24,411	<i>25,632</i>	1,221	26,913	28,259
350 Repairs & Maintenance	<i>1,483</i>	2,040	2,040	<i>2,081</i>	41	2,122	2,165
366 Professional Development	<i>2,969</i>	5,100	5,100	<i>5,202</i>	102	5,306	5,412
370 Building Lease	<i>253,380</i>	253,380	253,380	<i>174,578</i>	-78,802	174,578	174,578
401 General Supplies	<i>13,705</i>	23,413	23,413	<i>23,881</i>	468	24,359	24,846
405/406 Software	<i>753</i>	510	510	<i>520</i>	10	531	541
465 Non - Instructional Technology	<i>9,525</i>	0	0	<i>0</i>	0	0	0
490 Food	<i>225</i>	408	408	<i>416</i>	8	424	433
820 Dues & Membership	<i>16,644</i>	20,948	20,948	<i>21,995</i>	1,047	23,095	24,249
920 Fund Balance Transfer	<i>0</i>	16,098	29,524	<i>13,741</i>	-15,783	14,428	15,149
<b>Total Administration &amp; Operations</b>	<b><i>\$652,031</i></b>	<b>\$684,821</b>	<b>\$728,768</b>	<b><i>\$628,952</i></b>	<b>-\$99,816</b>	<b>\$652,631</b>	<b>\$672,092</b>
<b>Instructional</b>							
100 Salaries	<i>\$543,894</i>	\$615,585	\$612,741	<i>\$575,809</i>	-\$36,932	\$587,325	\$599,072
200 Benefits	<i>121,497</i>	156,483	153,185	<i>\$153,691</i>	505	\$158,578	\$167,740
305 Contracted Services	<i>3,906</i>	0	0	<i>\$0</i>	0	\$0	\$0
360 Transportation - Field Trips & Registration	<i>11,299</i>	12,555	12,555	<i>\$13,183</i>	628	\$13,842	\$14,534
366 Travel & Conferences	<i>2,934</i>	6,300	6,300	<i>\$6,615</i>	315	\$6,946	\$7,293
401 General Supplies	<i>10,372</i>	13,948	13,948	<i>\$14,646</i>	697	\$15,378	\$16,147
405 Purchased Software	<i>1,915</i>	0	0	<i>\$0</i>	0	\$0	\$0
430 Instructional Supplies	<i>17,545</i>	29,756	29,756	<i>\$31,244</i>	1,488	\$32,806	\$34,446
461 Standardized Tests	<i>0</i>	2,625	2,625	<i>\$2,756</i>	131	\$2,894	\$3,039
490 Food	<i>1,127</i>	0	0	<i>\$0</i>	0	\$0	\$0
820 Dues & Membership	<i>1,370</i>	1,103	1,103	<i>\$1,158</i>	55	\$1,216	\$1,276
<b>Total Instructional</b>	<b><i>\$715,859</i></b>	<b>\$838,355</b>	<b>\$832,213</b>	<b><i>\$799,100</i></b>	<b>-\$33,113</b>	<b>\$818,984</b>	<b>\$843,547</b>
<b>Title Programs</b>							
100 Salaries	<i>\$16,109</i>	\$0	\$16,536	<i>\$16,867</i>	\$331	\$17,204	\$17,548
200 Benefits	<i>2,642</i>	0	4,134	<i>4,502</i>	368	4,645	4,914
<b>Total Title Programs</b>	<b><i>\$18,751</i></b>	<b>\$0</b>	<b>\$20,670</b>	<b><i>\$21,369</i></b>	<b>\$699</b>	<b>\$21,850</b>	<b>\$22,462</b>
<b>Special Education</b>							
100 Salaries	<i>\$421,837</i>	\$361,907	\$436,155	<i>\$462,118</i>	\$25,963	\$471,360	\$480,787
200 Benefits	<i>77,477</i>	91,998	109,039	<i>123,345</i>	14,306	127,267	134,620
305 Contracted Services	<i>46,717</i>	7,166	7,166	<i>7,525</i>	358	7,901	8,296
366 Travel & Conferences	<i>417</i>	1,130	1,130	<i>1,186</i>	56	1,246	1,308
394 Payments to Other Agencies	<i>337,031</i>	316,654	316,654	<i>232,487</i>	-84,167	244,112	256,317
401 General Supplies		4,599	4,599	<i>4,829</i>	230	5,070	5,324
405 Purchased Software	<i>1,258</i>	1,725	1,725	<i>1,984</i>	259	2,281	2,624
433 Instructional Supplies	<i>485</i>	8,671	8,671	<i>9,104</i>	434	9,560	10,038
820 Dues & Membership	<i>59</i>	0	0	<i>0</i>	0	0	0
<b>Total Special Education</b>	<b><i>\$885,281</i></b>	<b>\$793,850</b>	<b>\$885,139</b>	<b><i>\$842,578</i></b>	<b>-\$42,561</b>	<b>\$868,797</b>	<b>\$899,314</b>
<b>Total General Fund</b>	<b><i>\$2,271,922</i></b>	<b>\$2,317,026</b>	<b>\$2,466,790</b>	<b><i>\$2,292,000</i></b>	<b>-\$174,790</b>	<b>\$2,362,261</b>	<b>\$2,437,415</b>

	<i>FY24 - Actual</i>	FY25 - Adopted	FY25 - Revised	<i>FY26</i>	Difference FY25 Revised & FY26	FY27	FY28
<b>Food Service Fund</b>							
100 Salaries	\$6,288	\$6,569	\$12,206	\$0	-\$12,206	\$0	\$0
200 Benefits	2,167	3,064	3,052	0	-3,052	0	0
305 Contracted Services	267	0	0	0	0	0	0
490 Food	137,517	143,342	125,582	131,911	6,329	138,564	145,558
<b>Total Food Service Fund</b>	<b>\$146,239</b>	<b>\$152,976</b>	<b>\$140,840</b>	<b>\$131,911</b>	<b>-\$8,928</b>	<b>\$138,564</b>	<b>\$145,558</b>
<b>Community Service Fund</b>							
100 Salaries	109,598	\$99,266	\$83,136	\$87,340	\$4,203	\$89,086	\$90,868
200 Benefits	22031	20,992	21,202	21,202	0	21,414	21,628
394 Field Trips	0	232	232	243	12	255	268
401 Supplies	0	1,418	1,418	1,489	71	1,563	1,641
820 Dues & Membership	0	212	212	243	32	280	322
<b>Total Community Service Fund</b>	<b>\$131,629</b>	<b>\$122,119</b>	<b>\$106,199</b>	<b>\$110,517</b>	<b>\$4,317</b>	<b>\$112,599</b>	<b>\$114,727</b>
<b>TOTAL EXPENSES - SCHOOLWIDE</b>	<b>\$2,549,790</b>	<b>\$2,592,120</b>	<b>\$2,713,829</b>	<b>\$2,534,427</b>	<b>-\$179,401</b>	<b>\$2,613,423</b>	<b>\$2,697,701</b>
<b>ANNUAL SURPLUS/(DEFICIT)</b>	<b>\$222,580</b>	<b>\$52,793</b>	<b>\$4,399</b>	<b>\$125,375</b>	<b>\$120,977</b>	<b>\$97,920</b>	<b>\$69,199</b>
<b>CUMULATIVE FUND BALANCE</b>	<b>\$737,684</b>	<b>\$790,477</b>	<b>\$742,083</b>	<b>\$867,458</b>		<b>\$965,378</b>	<b>\$1,034,577</b>
<b>FUND BALANCE %</b>	<b>29%</b>	<b>30%</b>	<b>27%</b>	<b>34%</b>		<b>37%</b>	<b>38%</b>

	Fund Balance 7/1/2025	Projected Rev FY26	Projected Exp FY26	Ending Projected Fund Bal 06/30/2026	Profit (Loss)
Fund 1 - General	\$711,146	\$2,402,267	\$2,292,000	\$821,413	\$110,267
Fund 2 - Food Service	\$3,333	\$131,911	\$131,911	\$3,333	\$0
Fund 4 - Community Service	\$54,737	\$125,625	\$110,517	\$69,845	\$15,108
Total All funds	\$769,216	\$2,659,803	\$2,534,427	\$894,591	\$125,375

## CONSULTING AGREEMENT

THIS CONSULTING AGREEMENT (the "Agreement") dated this \_\_\_\_ day of \_\_\_\_\_, 2022

### BETWEEN:

SWAN RIVER MONTESSORI CHARTER SCHOOL

(the "Client")

- AND -

The Anton Group, LLC

(the "Contractor").

### BACKGROUND:

- A. The Client is of the opinion that the Contractor has the necessary qualifications, experience and abilities to provide services to the Client.
- B. The Contractor is agreeable to providing such services to the Client on the terms and conditions set out in this Agreement.

**IN CONSIDERATION OF** the matters described above and of the mutual benefits and obligations set forth in this Agreement, the receipt and sufficiency of which consideration is hereby acknowledged, the Client and the Contractor (individually the "Party" and collectively the "Parties" to this Agreement) agree as follows:

#### Services Provided

- 1. The Client hereby agrees to engage the Contractor to provide the Client with services (the "Services") consisting of:
  - o See Appendix A.
- 2. The Services will also include any other tasks which the Parties may agree on for the stated hourly rate in Appendix B. The Contractor hereby agrees to provide such Services to the Client under these parameters.

#### Term of Agreement

- 3. The initial term of this Agreement (the "Term") will begin on 7/1/2022 and will remain in full force through June 30, 2025. Thereafter, the Term of the Agreement shall automatically renew for a successive one (1) year term unless one party provides written notice to the other party thirty (30) days in advance of the end of the existing term that the party does not wish to continue the services outlined herewith in Appendix A. After the initial Term of the Agreement the monthly fees will increase by 5% per year unless renewed Agreement is executed.

This contract can be terminated with a thirty (30) day written notice without cause to either party. In the event that the thirty-day termination notice is exercised all past due, current, and obligated fees that would be assessed during the thirty-day period are due upon demand.

The payment terms are defined in Appendix B of this agreement.

4. In the event that either Party breaches a material provision under this Agreement, the non-defaulting Party may request the defaulting Party to indemnify the non-defaulting Party against all reasonable damages.
5. In the event that fraud or misuse of public funds is identified immediate termination of this Agreement will be allowable with written notice to either Party. If immediate termination of this agreement is exercised all past due, current, and fees that would be assessed during the ninety-day termination period are due upon demand.
6. The Contractor reserves the right to communicate openly with any and all regulatory bodies that oversee the Client's operations, governance, and existence. Preauthorization to open communications with any regulatory body is not required by the Contractor.

#### Performance

7. The Parties agree to do everything necessary to ensure that the terms of this Agreement take effect.

#### Currency

8. Except as otherwise provided in this Agreement, all monetary amounts referred to in this Agreement are in US Dollars.

#### Compensation

9. For the services rendered by the Contractor as required by this Agreement, the Client will provide compensation (the "Compensation") to the Contractor as follows:

- See Appendix B.

10. The Compensation as stated in this Agreement does not include sales tax, or other applicable duties as may be required by law. Any sales tax and duties required by law will be charged to the Client in addition to the Compensation.

#### Reimbursement of Expenses

11. The Contractor will not be reimbursed for expenses incurred by the Contractor in connection with providing the Services of this Agreement.

#### Confidentiality

12. Confidential information (the "Confidential Information") refers to any data or information relating to the business of the Client which would reasonably be considered to be proprietary to the Client including, but not limited to, accounting records, business processes, and client records and that is not generally known in the industry of the Client and where the release of that Confidential Information could reasonably be expected to cause harm to the Client.

The Contractor agrees that it will not disclose, divulge, reveal, report or use, for any purpose, any Confidential Information which the Contractor has obtained, except as authorized by the Client. This obligation will survive the expiration or termination of this Agreement and will continue for one (1) year from the date of such expiration or termination.

All written and oral information and materials disclosed or provided by the Client to the Contractor under this Agreement is Confidential Information regardless of whether it was provided before or after the date of this Agreement or how it was provided to the Contractor.

#### Ownership of Materials and Intellectual Property

13. All intellectual property and related materials (the "Intellectual Property") including any related work in progress that is developed or produced under this Agreement, will be the property of the Contractor. The Client is granted a non-exclusive limited-use license of this Intellectual Property.

Title, copyright, intellectual property rights and distribution rights of the Intellectual Property remain exclusively with the Contractor.

#### Return of Property

14. Upon the expiry or termination of this Agreement, the Contractor will return to the Client any property, documentation, records, or Confidential Information which is the property of the Client.

#### Capacity/Independent Contractor

15. In providing the Services under this Agreement it is expressly agreed that the Contractor is acting as an independent contractor and not as an employee. The Contractor and the Client acknowledge that this Agreement does not create a partnership or joint venture between them, and is exclusively a contract for service.

#### Notice

16. All notices, requests, demands or other communications required or permitted by the terms of this Agreement will be given in writing and delivered to the Parties of this Agreement as follows:
  - a. SWAN RIVER MONTESSORI CHARTER SCHOOL  
500 Maple Street  
Monticello, MN 55362
  - b. The Anton Group, LLC  
2303 Wycliff Street  
Suite E200  
St. Paul, MN 55114

or to such other address as any Party may from time to time notify the other.

#### Indemnification

17. Except to the extent paid in settlement from any applicable insurance policies, and to the extent permitted by applicable law, each Party agrees to indemnify and hold harmless the other Party, and its respective directors, stockholders, affiliates, officers, agents, employees, and permitted successors and assigns against any and all claims, losses, damages, liabilities, penalties, punitive damages, expenses, reasonable legal fees and costs of any kind or amount whatsoever, which result from or arise out of any act or omission of the indemnifying party, its respective directors, stockholders, affiliates, officers, agents, employees, and permitted successors and assigns that occurs in connection with this Agreement. This indemnification will survive the termination of this Agreement.

#### Insurance

18. The Contractor will be required to maintain general liability insurance including coverage for bodily injury and property damage at a level that would be considered reasonable in the industry of the Contractor based on the risk associated with the characteristics of this Agreement and only to the extent permitted by law. All insurance policies will remain materially unchanged for the duration of this Agreement.

#### Legal Expenses

19. In the event that legal action is brought to enforce or interpret any term of this Agreement, the prevailing Party will not be entitled to recover, excluding any other damages or award, any legal costs and fees associated with the action.

#### Modification of Agreement

20. Any amendment or modification of this Agreement or additional obligation assumed by either Party in connection with this Agreement will only be binding if evidenced in writing signed by each Party or an authorized representative of each Party.

#### Time of the Essence

21. Time is of the essence in this Agreement. No extension or variation of this Agreement will operate as a waiver of this provision.

#### Assignment

22. The Contractor will not voluntarily, or by operation of law, assign or otherwise transfer its obligations under this Agreement without the prior written consent of the Client.

#### Entire Agreement

23. It is agreed that there is no representation, warranty, collateral agreement or condition affecting this Agreement except as expressly provided in this Agreement.

#### Titles/Headings

24. Headings are inserted for the convenience of the Parties only and are not to be considered when interpreting this Agreement.

#### Gender

25. Words in the singular mean and include the plural and vice versa. Words in the masculine mean and include the feminine and vice versa.

#### Governing Law

26. It is the intention of the Parties to this Agreement that this Agreement and the performance under this Agreement, and all suits and special proceedings under this Agreement, be construed in accordance with and governed, to the exclusion of the law of any other forum, by the laws of the State of Minnesota, without regard to the jurisdiction in which any action or special proceeding may be instituted.

#### Severability

27. In the event that any of the provisions of this Agreement are held to be invalid or unenforceable in whole or in part, all other provisions will nevertheless continue to be valid and enforceable with the invalid or unenforceable parts severed from the remainder of this Agreement.

#### Waiver

28. The waiver by either Party of a breach, default, delay or omission of any of the provisions of this Agreement by the other Party will not be construed as a waiver of any subsequent breach of the same or other provisions.

The Parties have duly affixed their signatures on this \_\_\_\_\_ day of \_\_\_\_\_, 2022.

SWAN RIVER MONTESSORI CHARTER  
SCHOOL (Client)

Per:\_\_\_\_\_

The Anton Group, LLC (Contractor)

Per:\_\_\_\_\_



## APPENDIX A – SERVICES – JULY 1, 2022 – JUNE 30, 2025

The following finance management services will be provided to your school for the duration of the agreement. Note that any reference to TAG (The Anton Group, LLC) is referring to the Contractor services and responsibilities under this agreement.

- **Business Advisory Services:** TAG's professionals have extensive experience working in the business world both for their clients and privately. The advisory services we provide our clients is rooted in years of direct experience working with charter schools. This combination provides TAG's partner schools with access to acute business acumen that can provide significant benefits to your organization. An example of service deliverables are:
  - Employee benefit review and analysis
  - Commercial insurance policy review and analysis
  - Vendor contract review and analysis
  - Lease/Facility negotiation support
  - Business process review and development
  - Business tools/forms review and development
- **Board/Staff Development:** Initial and ongoing training is vital to developing an educated school staff and board of directors. Not only is the training essential, but it is central to the services TAG provides our partner schools. From the onset, TAG will lead and develop the school leadership and board in financial literacy, HR topics, and board governance subjects. TAG has developed a tailored ongoing training program that dives into the important details of charter finance and highlights factors that have a direct impact on your school. An example of service deliverables are:
  - Conduct ongoing training on charter school finance related topics
  - Provide directly relevant examples to help facilitate the development process
- **Budget Development:** TAG will lead in the development of the annual operational budget and long-range forecast. Based on your business calendar, TAG will initiate the annual budget process as well as continually develop the 3 to 5-year long range forecast. TAG uses a proprietary budget file that can be provided to the school leadership for scenario planning. No other business management firm goes to the length to provide you with the tools needed to help manage your organization's future. An example of service deliverables are:
  - Develop 1-year detailed operational budget that directly address the school academic needs
  - Develop long range forecast (3–5-year forecast) based enrollment trends and academic needs
  - Continually monitor and update forecast as needed
- **Accounts Payable/Receivable Processing:** TAG's professionals will review the pending invoices, ensure proper authorization for payment is present and incorporate the necessary internal controls to safeguard the disbursement of funds. Also, TAG will review and record the various cash receipts received by the school. TAG will ensure correct account coding is used to mitigate any potential for inaccurate reporting.
- **Financial Reporting:** TAG will tailor the various monthly financial reports for your school in compliance with GAAP and GASB standards. Every organization has specific needs regarding financial reporting. As such, TAG will work with the school's leadership to develop the respective reports and schedules to provide clear financial reporting to aid in the decision-making process. An example of service deliverables are:
  - Comprehensive monthly financial statements tailored to meet the school's reporting structure
  - Detailed narrative describing the financial status quo as well as addressing budget variances

- Layered analytical tools to help assess the financial health and validity of the operating budget
  - Data based recommendations to school leadership based on financial analysis performed
  - Attend board meetings or finance committee meetings on a quarterly basis
- **Cash Flow Forecasting:** In addition to the budget development TAG's professionals expend considerable amounts of time ensuring the immediate and long range cash flow forecast best reflect the reality and differences between the operational budget and the cash flow timing. This is essential to ensuring operations are sustainable without cash flow concerns. An example of service deliverables are:
- Prepare cash flow to identify capital needs
  - Monthly updates reported along with the monthly financial statements
  - Scenario planning for larger purchases to ensure liquidity is maintained
- **Federal/State Grant Management:** TAG's grant professionals will help manage the School's various state, federal grants, and private grants that your school receives. Our services range from helping develop and enter the applications into the respective systems to compliance reporting for the grant. An example of service deliverables are:
- Continually updated grant tracking reports
  - Assist with MDE audits of grants
  - Compliance monitoring for expenditures/use of funds
- **Audit Management:** TAG's experience as past charter school auditors provide your school a very valuable service in protecting your annual audit report. TAG will manage the audit process from start to finish including the issuance of the audit reports and 990 tax return. An example of service deliverables are:
- Be main point of contact with the selected audit firm
  - Preaudit all requested financial information/documentation prior to auditor submission
  - Ensure state and federal compliance is maintained for all transactions tested
  - Manage audit scheduling, fieldwork, and reporting
  - Manage the 990 tax reporting after fieldwork is completed with the respective audit firm
- **Payroll Management:** TAG's Payroll Staff will effectively manage and monitor the School's payroll process. Our Payroll Staff allows all your payroll activity to be fully integrated in the finance system all while utilizing some of the most experienced payroll professionals available to charter schools. This structure saves the School money and provides critical expertise and depth on this central process. An example of service deliverables are:
- Complete payroll processing
  - Manage employee agreements and pay calculations
  - Work with internal and contracted HR teams to ensure internal controls
  - Review quarterly 941 tax returns & annual reporting requirements
- **Compliance & Internal Control Monitoring:** TAG's extensive experience as charter school auditors and business managers put us in a unique position to provide compliance and internal control monitoring for the school. An example of service deliverables are:
- Reporting on compliance elements for state, federal, and local funds
  - Delivery of policy, process, and control recommendations
  - Development of revised/new operational processes that align with the financial policies
- **Onsite Meetings:** Onsite meetings may be considered necessary to carry out some aspects of the service proposal. Included with the services provided TAG will provide regular meeting time to discuss financial topics, budget development, and attend finance committee/board meetings. To help be as

efficient as possible, additional meetings can be held by TAG's web meeting. TAG representative will attend board meetings at least quarterly.

- **TAG Technology:** TAG has invested significant resources to enable our clients to receive the highest quality and most cutting-edge systems and software to help increase efficiencies. TAG's file share system, task management software, and other tools are provided to your school at no additional cost. Since day one, TAG has been operating as a paperless firm. As a result, we're able to leverage the benefits to our clients via reduced cost and better access to vital information. Below are some of our core technologies we've invested in to facilitate our work and provide direct benefits to our clients.
- **Zendesk – AP Management Software:** TAG utilizes Zendesk to help manage and track all accounts payable/accounts receivable submissions and other items that require processing by TAG. Zendesk is a powerful customer service software that helps keep us and our clients organized. With this investment, our schools are provided cost free access with a private portal to monitor the progress of the school's submissions.
- **Egnyte – File Share Software:** Transparency and communication are paramount in maintaining a high-quality partnership with our clients. With Egnyte we provide our clients with direct access to the school's data in a paperless environment. From accounts payable batches to budget files – we provide access to every document processed by the school and TAG. Additionally, our files are backed up in a triple-redundant method ensuring no files can ever be lost or compromised. This system is highly encrypted and fully secured to ensure integrity of the school's information is never compromised.
- **Document Management:** TAG's business processes require the highest standard of security and availability to our partner client's important business documents. TAG employs cutting edge imaging technology and an industry leading file share system. Most importantly, your documents are secured by high-level encryption and backed up via TAG's 3x redundant backup system.

## APPENDIX B - FEES

The services detailed in this agreement will be provided for the rates listed below:

July 1, 2022 – June 30, 2023: \$4,000/month  
July 1, 2023 – June 30, 2024: \$4,250/month  
July 1, 2024 – June 30, 2025: \$4,500/month

Any services provided not outlined in Appendix A may be provided upon mutual agreement between the Client and Contractor for an additional hourly rate of \$100/hour.

TAG will manage and complete the Lease Aid Application annually for \$1,200 at client request.

Invoices for the month of service will be sent to the Client on the first day of the month where service is provided. Payment in full is due by the 15th of the month of service. Every effort to maintain this payment schedule should be made by the Client. If late payments are made the Client agrees to a 2% monthly late fee. This fee will be assessed on the subsequent invoice.



MN Association of  
Charter Schools

**MINNESOTA CHARTER SCHOOL**  
**COMPENSATION REPORT**

**2024-25**

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# INTRODUCTION

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The **Minnesota Association of Charter Schools (MACS) Compensation Survey** was initiated in 2006 in response to requests from the Association's Member Schools for comparative data regarding salaries and benefits offered in Minnesota's chartered public schools. The current report is based on a survey conducted between August 2024 and December 2024.

**Approximately 44% of Minnesota chartered public schools completed the survey.** The results of the current report provide a representative picture of Minnesota's charter school compensation.

The information collected through the survey provides invaluable information on the compensation and benefits being offered by Minnesota's charter schools. The report is used by charter school boards, finance committees, personnel committees, school directors, and business managers in their financial planning and budgeting decision-making processes. The survey also assists MACS in assessing current trends regarding compensation in Minnesota's charter school sector.

**The survey results are presented in this report according to school enrollment size, broken down into six (6) categories:** *Under 100 Students, 100-174 Students, 175-249 Students, 250-499 Students, 500-999 Students, and 1,000 or More Students.*

It is important to note that while charter school enrollment size seems to be a significant determinant in salaries and benefits, it is not the only factor. **Even among charter schools of similar enrollment size, student characteristics that drive categorical aid (e.g. compensatory aid) lead to variability in total revenue.** It is also important to mention that the compensation package of any chartered public school will not look exactly like that of another school given their unique mission, philosophies, and values – which is the entire point of chartering. Additionally, each chartered public school develops unique job descriptions to meet the needs of their organization. As a result, titles/positions do not always directly correlate across schools.

Because of these facts, this report provides ranges and averages to guide local discussions and decisions. We hope you'll find the data both useful and thought-provoking. Please contact us with any questions or suggestions for the next survey, which is scheduled to be conducted in 2026.



Minnesota Association of Charter Schools  
161 Rondo Ave., Suite 1000, St. Paul, MN 55103  
P: 651-789-3090 | F: 651-789-3093  
[mncharterschools.org](http://mncharterschools.org)

# OVERVIEW

The Minnesota Charter School Compensation Survey was conducted from August 2024 through December 2025. All 173 charter school directors in Minnesota were sent the survey, with **76 (44%)** submitting complete responses.

SCHOOL SIZE CATEGORIES & SURVEY PARTICIPANTS							
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS	TOTALS
OPERATING SCHOOLS	32	35	27	35	33	11	173
SURVEY PARTICIPANTS	13	15	13	13	15	7	76
% OF TOTAL	41%	34%	48%	34%	45%	64%	44%

The survey asks for information on salaries and benefits provided to charter school directors, administrators, teachers, and staff, as well as compensation allocated to contractors, and is organized into three (3) comprehensive sections that correspond to the survey questions:

## Part 1: School Information

Contains information on *employment and enrollment totals, actual expenditures, bookkeeping and payroll processes, pay schedules, and employee departures.*

## Part 2: Salary & Wage Information

Contains information on *financial compensation for administrative staff, professional staff (teaching), professional staff (non-teaching), and support staff, as well as salary systems, salary and wage increases, and end-of-year bonuses/stipends.*

## Part 3: Benefits Information

Contains information on *health insurance, additional full-time employee benefits and leave, and additional part-time employee benefits and leave.*



# PART 1: SCHOOL INFORMATION

## ENROLLMENT

- The **average enrollment** of surveyed schools is **384**

AVERAGE SCHOOL ENROLLMENT						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE ENROLLMENT	75	132	208	379	716	1,250*
ENROLLMENT RANGE (MINIMUM)	20	100	179	257	515	1,023*
ENROLLMENT RANGE (MAXIMUM)	96	167	235	484	999	1,543*

\*One (1) school reported having 4,943 enrolled students – they were excluded from average and range calculations due to outlier data

## EMPLOYEES

### All Employees

- Surveyed schools reported a **total** of **5,178 employees in FY24**
- The **average number of employees** per surveyed school is **77**

AVERAGE # OF EMPLOYEES BY SCHOOL SIZE						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE TOTAL # OF EMPLOYEES	19	33	43	62	122	184
FULL-TIME LICENSED	9	16	24	35	72	115
FULL-TIME NON-LICENSED	9	12	15	23	43	46
PART-TIME LICENSED	< 1	1	2	2	2	3
PART-TIME NON-LICENSED	1	2	3	3	8	21

### Administrators

- The **average number of BOSA Licensed Administrators** per surveyed school is **2**
- The **average number of Non-Licensed Administrators** per surveyed school is **2**

AVERAGE # OF ADMINISTRATORS BY SCHOOL SIZE						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
BOSA LICENSED	< 1	1	1	1	2	6
BOSA LICENSED (RANGE)	0-1	0-2	0-3	0-5	0-5	4-9
NON-LICENSED	1	1	1	2	3	2
NON-LICENSED (RANGE)	0-3	0-3	0-4	0-5	0-7	0-5

## PELSB Licensed Employees

- The **average number of Full-Time PELSB Licensed Employees** per surveyed school is **43**
- The **average number of Full-Time PELSB Licensed Employees in Other Positions** per surveyed school is **3**
- The **average number of Part-Time PELSB Licensed Employees** per surveyed school is **2**

AVERAGE # OF PELSB LICENSED EMPLOYEES BY SCHOOL SIZE						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
FULL-TIME - WORKING W/ STUDENTS	8	14	20	31	65	103
FT WORKING W/ STUDENTS (RANGE)	3-14	9-15 <sup>1</sup>	11-28	23-48	41-120	58-125 <sup>2</sup>
FULL-TIME - OTHER POSITIONS	< 1	1.5	2.5	2	5	5.5
FT OTHER POSITIONS (RANGE)	0-3	0-6	0-28	0-10	0-15	0-22
PART-TIME	< 1	1.5	1.5	2	2	3
PART-TIME (RANGE)	0-2	0-4	0-8	0-13	0-11	1-7

<sup>1</sup>One (1) school with 90%+ SPED enrollment reported having 48 Full-Time PELSB Licensed Employees – excluded from average and range

<sup>2</sup>One (1) school with outlier enrollment (4,943) reported having 160 Full-Time PELSB Licensed Employees – excluded f/ average and range

<sup>3</sup>One (1) school with 90%+ SPED enrollment reported having 45 Full-Time Non-Licensed Employees – excluded from average and range

## Non-Licensed Employees

- The **average number of Full-Time Non-Licensed Employees** per surveyed school is **23**
- The **average number of Part-Time Non-Licensed Employees** per surveyed school is **6.5**

AVERAGE # OF NON-LICENSED EMPLOYEES BY SCHOOL SIZE						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
FULL-TIME	7.5	11	13.5	21	40	44
PART-TIME	1	2	3	3	8	21

## EXPENDITURES

- The **total compensation expenditures** of surveyed schools are **\$294,167,630**
- The **average total compensation expenditures** of surveyed schools are **\$4,384,600**
- The **total compensation expenditures per student** for surveyed schools is **\$8,712**

## Total Salaries (Salaries & Wages)

- The **average total salaries and wages** of surveyed schools is **\$3,395,492**

FY24 ACTUAL EXPENDITURES – AVERAGE SALARIES & WAGES <sup>1</sup>						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVG SALARIES / WAGES	\$774,159	\$1,455,813 <sup>2</sup>	\$1,777,185	\$2,996,284	\$5,299,389	\$8,070,125 <sup>3</sup>
SALARIES / WAGES (MIN)	\$292,575	\$761,527 <sup>2</sup>	\$944,338	\$1,817,035	\$2,520,085	\$4,738,455 <sup>3</sup>
SALARIES / WAGES (MAX)	\$1,750,687	\$1,933,837 <sup>2</sup>	\$2,484,879	\$5,462,235	\$11,956,421	\$10,744,732 <sup>3</sup>

<sup>1</sup>One (1) school provided erroneous expenditures data – they were not included in the calculations above

<sup>2</sup>One (1) school with 90%+ SPED enrollment reported outlier expenditures – they were not included in the calculations above

<sup>3</sup>One (1) school with outlier enrollment (4,943) reported outlier expenditures – they were not included in the calculations above

### Total Benefits (Benefits & Payroll) (Health Insurance / Retirement / Dental / Vision / etc.)

- The average total benefits and payroll for surveyed schools is **\$978,800**

FY24 ACTUAL EXPENDITURES – AVERAGE BENEFITS & PAYROLL <sup>1</sup>						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVG BENEFITS / PAYROLL	\$185,694	\$405,321 <sup>2</sup>	\$637,063	\$839,982	\$1,412,072	\$2,392,668 <sup>3</sup>
BENEFITS / PAYROLL (MIN)	\$60,045	\$100,416 <sup>2</sup>	\$216,696	\$502,117	\$713,304	\$1,408,457 <sup>3</sup>
BENEFITS / PAYROLL (MAX)	\$542,332	\$401,348 <sup>2</sup>	\$2,016,887	\$1,269,034	\$3,164,580	\$2,687,983 <sup>3</sup>

<sup>1</sup>One (1) school provided erroneous expenditures data – they were not included in the calculations above

<sup>2</sup>One (1) school with 90%+ SPED enrollment reported outlier expenditures – they were not included in the calculations above

<sup>3</sup>One (1) school with outlier enrollment (4,943) reported outlier expenditures – they were not included in the calculations above

### Total Professional Development (Includes Staff Training)

- The average total professional development for surveyed schools is **\$30,234**

FY24 ACTUAL EXPENDITURES – AVERAGE PROFESSIONAL DEVELOPMENT <sup>1</sup>						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVG PROFESSIONAL DEV	\$6,706	\$18,778 <sup>2</sup>	\$16,544	\$28,302	\$39,599	\$71,477 <sup>3</sup>
PROFESSIONAL DEV (MIN)	\$0	\$310 <sup>2</sup>	\$0	\$6,000	\$0	\$22,018
PROFESSIONAL DEV (MAX)	\$27,223	\$91,174 <sup>2</sup>	\$51,250	\$118,697	\$139,852	\$276,700

<sup>1</sup>One (1) school provided erroneous expenditures data – they were not included in the calculations above

<sup>2</sup>One (1) school with 90%+ SPED enrollment reported outlier expenditures – they were not included in the calculations above

<sup>3</sup>One (1) school with outlier enrollment (4,943) reported outlier expenditures – they were not included in the calculations above

## BOOKKEEPING & PAYROLL

- 19.7% of surveyed schools have **in-house bookkeeping / payroll / accounting services**
  - 80% of those with **in-house services** have **250 or less enrolled students**
  - Only **one (1) school** of those surveyed **with over 500 enrolled students** has **in-house services** – all other schools with over 500 enrolled students report contracting with outside companies

- **Companies cited** as contracted for bookkeeping, payroll, and accounting services include:
  - **Creative Planning (24 mentions)** – bookkeeping, payroll, accounting
  - **EdFinMN (12 mentions)** – payroll, accounting, finances
  - **CliftonLarsonAllen (8 mentions)** – bookkeeping, payroll, accounting, and more...
  - **Dieci School Finance (6 mentions)** – bookkeeping, accounting
  - **EdVisions (4 mentions)** – payroll, benefits
  - **School Management Services (4 mentions)** – payroll, business mgmt., invoicing
  - Other companies cited: **Designs for Learning (3)**, **Region V (3)**, **cmERDC (2)**, **Dawn Jenkins (independent contractor) (2)**, and **eight (8) others with one (1) mention each**

## EMPLOYEE DEPARTURES

- Surveyed schools indicated a **total of 789 employee departures in FY24**
  - This equates to a **turnover rate of 15.2%** when compared to total employees (5,178)

EMPLOYEE DEPARTURES & BASIS FOR DEPARTURES						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
RETIRED	3	5	8	10	16	10
NEW JOB WITHIN SECTOR	16	16	27	29	153	54
JOB IN NEW FIELD / SELF-EMPLOYED	7	14	20	26	46	38
PURSUE FURTHER EDUCATION	2	0	3	5	11	0
LEFT DUE TO WORKLOAD	2	6	1	0	22	1
MOVED TO ANOTHER CITY/AREA	4	6	7	10	17	6
EMPLOYER DECISION / TERMINATED	12	22	10	36	87	20
TOTALS	46	69	76	116	352	129

## PART 2: SALARY & WAGE INFORMATION

### ADMINISTRATIVE STAFF

#### Executive Directors / School Directors

- The **average salary** across reporting schools is **\$116,018**
- The **average percentage of salary increase in FY24** is **5.1%**
- 86.7%** of reporting schools' **Executive/School Directors** have a **graduate degree**
  - 64%** have a **master's degree or master's degree + additional education**
  - 12%** have an **education specialist or education doctorate degree**
  - 10.7%** have a **doctorate degree**
- 58.7%** of reporting schools' **Executive/School Directors** hold a **MN Administrative License**

SALARY INFORMATION FOR EXECUTIVE/SCHOOL DIRECTOR						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE (AVG) SALARY	\$77,401	\$95,035	\$105,121	\$126,242	\$142,977	\$170,668
SALARY RANGE (MIN)	\$47,119	\$60,000	\$75,000	\$105,000	\$102,657	\$123,543
SALARY RANGE (MAX)	\$101,679	\$132,808	\$134,000	\$150,000	\$189,108	\$225,000
SALARY INCREASE FOR FY24? (YES)	50%	73.3%	76.9%	53.9%	73.3%	85.7%
SALARY INCREASE FOR FY24? (NO)	50%	26.7%	13.1%	46.2%	26.7%	14.3%
AVG FY24 SALARY INCREASE (IF YES)	5.4%	7.3%	3%	4.3%	6.5%	2.6%
GRADUATE DEGREE (YES)	75%	86.7%	84.6%	92.3%	100%	85.7%
ADMINISTRATIVE LICENSE (YES)	41.7%	53.3%	61.5%	53.9%	66.7%	85.7%
# OF SCHOOLS RESPONDING	12	15	13	13	15	7

#### School Principals / Assistants or Academic Directors

- The **average salary** across reporting schools is **\$93,049**
- 80.7%** of reporting schools' **Principals / Asst./Academic Directors** have a **graduate degree**
- 75.4%** of reporting schools' **Principals / Asst./Academic Directors** are **admin licensed**
- Top job titles** reported: **"Director" (41.2%)**, **"Principal" (37.3%)**, and **"Lead" (3.9%)**

SALARY INFORMATION FOR SCHOOL PRINCIPAL / ASSISTANT/ACADEMIC DIRECTOR						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE SALARY	\$70,219	\$83,432	\$79,507	\$94,451	\$104,095	\$115,963
SALARY RANGE (MIN)	\$52,500	\$58,000	\$66,000	\$65,000	\$81,500	\$107,840
SALARY RANGE (MAX)	\$91,000	\$112,115	\$102,500	\$122,500	\$125,000	\$127,000
GRADUATE DEGREE (YES)	50%	90%	75%	81.8%	80%	100%
ADMINISTRATIVE LICENSE (YES)	83.3%	70%	87.5%	72.7%	73.3%	71.4%
# OF SCHOOLS REPORTING	6	10	8	11	15	7

### Other Supervisory Team Members (Administrative / Instructional / Leadership / Academic)

- The **average salary** across reporting schools is **\$79,572**
- **66.7%** of reporting schools' **Other Supervisory Team Members** have a **graduate degree**
- **74.4%** of reporting schools' **Other Supervisory Team Members** are **licensed**
- **Top job titles**: “**Director**” (41.9%), “**Principal**” (18.9%), and “**Coordinator**” (13.5%)

SALARY INFORMATION FOR OTHER SUPERVISORY TEAM MEMBERS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE SALARY	\$61,031	\$68,993	\$68,551	\$80,528	\$91,588	\$106,738
SALARY RANGE (MIN)	\$40,000	\$51,000	\$56,872	\$41,943	\$68,000	\$76,500
SALARY RANGE (MAX)	\$89,000	\$102,256	\$87,720	\$110,000	\$125,000	\$125,000
GRADUATE DEGREE (YES)	50%	66.7%*	20%*	64.7%*	76.9%*	85.7%*
ADMINISTRATIVE LICENSE (YES)	25%	66.7%*	80%*	76.5%*	80.8%*	92.9%*
# OF SCHOOLS REPORTING	4	4	3	11	15	7

\*Multiple Supervisory Team Member Positions reported – 78 positions were reported in total by all reporting schools

### Lead Teachers / Teacher Coordinators

- The **average salary** across reporting schools was **\$70,190**
- **Top job titles** reported: “**Coordinator**” (35.3%), “**Lead**” (29.4%), and “**Coach**” (17.7%)

SALARY INFORMATION FOR LEAD TEACHER / TEACHER COORDINATOR						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE SALARY	N/A <sup>1</sup>	\$65,000 <sup>2</sup>	\$73,321	\$77,250 <sup>3</sup>	\$64,428	\$70,950
SALARY RANGE (MIN)	N/A <sup>1</sup>	\$65,000 <sup>2</sup>	\$63,390	\$76,500 <sup>3</sup>	\$50,711	\$56,750
SALARY RANGE (MAX)	N/A <sup>1</sup>	\$65,000 <sup>2</sup>	\$84,252	\$78,000 <sup>3</sup>	\$82,224	\$83,430
# OF SCHOOLS REPORTING	1	2	2	4	4	4

<sup>1</sup>No Lead Teacher / Teacher Coordinator salary reported by Schools Under 100 Enrolled

<sup>2</sup>One (1) salary reported by Schools with 100-174 Enrolled is part-time (\$26,294) – excluded from average and range

<sup>3</sup>One (1) salary reported by Schools with 250-499 Enrolled is an outlier (\$12,500) – excluded from average and range

## PROFESSIONAL STAFF – TEACHERS

- Regarding the teacher's employment relationship with the school:
  - **76.3%** of reporting schools indicated **At-Will Employment**
  - **18.4%** of reporting schools indicated **Individual Annual (Time Certain) Contracts**
  - **5.3%** of reporting schools indicated **Collective Bargaining Agreement**

### Full-Time Licensed Teachers

- The **average salary** across reporting schools is **\$53,796**
  - The **average minimum salary** across reporting schools is **\$41,701**
  - The **average maximum salary** across reporting schools is **\$70,246**
- The **average FTE** for **Full-Time Licensed Teachers** across reporting schools is **32.9**

SALARY INFORMATION FOR FULL-TIME LICENSED TEACHERS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE SALARY	\$53,717	\$50,878	\$51,497	\$57,548	\$54,824	\$55,766
AVERAGE MINIMUM SALARY	\$41,701	\$42,639	\$39,314	\$43,244	\$41,054	\$41,369
MINIMUM SALARY RANGE (MIN)	\$32,000	\$34,500	\$32,000	\$37,054	\$35,000	\$38,571
MINIMUM SALARY RANGE (MAX)	\$63,107	\$50,556	\$47,599	\$49,098	\$45,000	\$46,818
AVERAGE MAXIMUM SALARY	\$61,341	\$59,648	\$70,181	\$78,112	\$76,397	\$80,544
MAXIMUM SALARY RANGE (MIN)	\$43,956	\$45,500	\$48,000	\$58,430	\$60,601	\$74,834
MAXIMUM SALARY RANGE (MAX)	\$81,025	\$80,000	\$86,600	\$100,858	\$95,607	\$87,500
AVERAGE F.T.E.	6.1	12.8	15.2	33.4	59.3	92.1*
F.T.E. RANGE	1-13	1-54.4	10-22.2	21-46.5	32-100	66-129.8*
# OF SCHOOLS REPORTING	13	15	13	13	15	7

\*One (1) school with outlier enrollment (4,943) reported having 160 FTE – they were excluded from average and range calculations

### Full-Time Licensed SPED Teachers

- The **average salary** across reporting schools is **\$57,172**
  - The **average minimum salary** across reporting schools is **\$46,404**
  - The **average maximum salary** across reporting schools is **\$69,453**
- The **average FTE for Full-Time Licensed SPED Teachers** across reporting schools is **7.4**

SALARY INFORMATION FOR FULL-TIME LICENSED SPED TEACHERS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE SALARY	\$54,246	\$54,886	\$55,926	\$62,071	\$57,875	\$60,794
AVERAGE MINIMUM SALARY	\$47,195	\$48,560	\$41,649	\$50,612	\$44,436	\$46,264
SALARY RANGE (MIN)	\$36,759	\$35,000	\$34,000	\$38,000	\$35,000	\$40,800
SALARY RANGE (MAX)	\$68,250	\$62,000	\$52,689	\$70,000	\$57,000	\$56,000
AVERAGE MAXIMUM SALARY	\$58,018	\$60,111	\$69,704	\$78,107	\$74,927	\$80,439
SALARY RANGE (MIN)	\$36,759	\$42,500	\$46,000	\$55,000	\$59,282	\$67,329
SALARY RANGE (MAX)	\$81,025	\$80,000	\$86,600	\$96,540	\$90,000	\$87,500
AVERAGE F.T.E.	1.9	6.4*	6.7	4.8	11	15.4
F.T.E. RANGE	1-5	1-6*	2-15.4	1-9.3	3-34	9-30
# OF SCHOOLS REPORTING	12	15	13	12	15	7

\*One (1) school with 90%+ SPED enrollment reported having 54.4 FTE – they were excluded from average and range calculations

### Substitute Teachers (Short-Term & Long-Term)

- The **average short-term daily rate** across reporting schools is **\$178.15**
- The **average long-term daily rate** across reporting schools is **\$194.78**
- Companies cited** as contracted for substitute teaching services: **Zen Educate (13 mentions)**, **Teachers On Call (4 mentions)**, **TeachersASAP (1 mention)**

INFORMATION ON DAILY RATE FOR SUBSTITUTE TEACHERS (SHORT-TERM & LONG TERM)						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE SHORT-TERM DAILY RATE	\$147.33	\$164.92	\$179.33	\$190.88	\$190.61	\$197.14
SHORT-TERM DAILY RATE (MIN)	\$110	\$130	\$75	\$150	\$85	\$165
SHORT-TERM DAILY RATE (MAX)	\$200	\$184	\$240	\$264.50	\$250	\$250
AVERAGE LONG-TERM DAILY RATE	\$168.60	\$172	\$207.35	\$220.05	\$202.34	\$206
LONG-TERM DAILY RATE (MIN)	\$119	\$130	\$150	\$160	\$160	\$185
LONG-TERM DAILY RATE (MAX)	\$275	\$200	\$250	\$275	\$275	\$250
# OF SCHOOLS REPORTING	10	13	12	12	12	7

## PROFESSIONAL STAFF – NON-TEACHERS

### School Counselors

- **61.8%** of surveyed schools **have a School Counselor**
  - **47.4%** **employ** their School Counselor(s)
  - **14.5%** **contract with** their School Counselor(s)
- The **average salary** across reporting schools that reported salaries is **\$58,727**
- The **average hourly wage** across reporting schools that reported hourly wages is **\$77.50**

SALARY INFORMATION FOR SCHOOL COUNSELORS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
EMPLOY	3	6	3	6	11	7
CONTRACTED	3	4	3	0	1	0
AVERAGE SALARY (IF SALARIED)	\$50,276	\$50,808	\$71,785	\$55,367	\$54,351	\$68,339
SALARY (IF SALARIED) (MIN)	\$45,652	\$40,000	\$58,628	\$41,432	\$43,222	\$53,650
SALARY (IF SALARIED) (MAX)	\$54,900	\$69,000	\$85,000	\$76,658	\$75,000	\$90,000
AVERAGE HOURLY RATE (IF HOURLY)	N/A	\$40	\$115	N/A	N/A	N/A
HOURLY RATE (IF HOURLY) (MIN)	N/A	\$40	\$115	N/A	N/A	N/A
HOURLY RATE (IF HOURLY) (MAX)	N/A	\$40	\$115	N/A	N/A	N/A
# OF SCHOOLS REPORTING SALARY	2	3	3	5	9	6
# OF SCHOOLS REPORTING HR WAGE	0	1	1	0	0	0

### School Social Workers

- **64.5%** of surveyed schools **have a School Social Worker**
  - **47.4%** **employ** their School Social Worker(s)
  - **17.1%** **contract with** their School Social Worker(s)
- The **average salary** across reporting schools that reported salaries is **\$61,105**
- The **average hourly wage** across reporting schools that reported hourly wages is **\$84.50**



SALARY INFORMATION FOR SCHOOL SOCIAL WORKERS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
EMPLOYED	3	6	4	7	13	3
CONTRACTED	3	4	2	1	1	2
AVERAGE SALARY (IF SALARIED)	\$67,442	\$57,213	\$61,336	\$66,359	\$57,325	\$65,224
SALARY (IF SALARIED) (MIN)	\$66,634	\$40,000	\$55,749	\$40,910	\$45,000	\$60,000
SALARY (IF SALARIED) (MAX)	\$68,250	\$68,000	\$70,258	\$107,000	\$75,000	\$75,000
AVERAGE HOURLY RATE (IF HOURLY)	N/A	\$87.50	N/A	N/A	\$90	\$73
HOURLY RATE (IF HOURLY) (MIN)	N/A	\$85	N/A	N/A	\$90	\$73
HOURLY RATE (IF HOURLY) (MAX)	N/A	\$90	N/A	N/A	\$90	\$73
# OF SCHOOLS REPORTING SALARY	2	5	3	6	10	3
# OF SCHOOLS REPORTING HR WAGE	0	2	0	0	1	1

### School Nurses

- **71.1%** of surveyed schools **have a School Nurse**
  - **21.1% employ** their School Nurse(s)
  - **50% contract** with their School Nurse(s)
- The **average salary** across reporting schools that reported salaries is **\$46,797\***
- The **average hourly wage** across reporting schools that reported hourly wages is **\$68.98**

SALARY INFORMATION FOR SCHOOL NURSES						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
EMPLOYED	0	3	2	0	5	6
CONTRACTED	6	5	7	10	9	1
AVERAGE SALARY (IF SALARIED)	N/A	\$18,520*	\$39,065*	N/A	\$45,933*	\$66,096
SALARY (IF SALARIED) (MIN)	N/A	\$2,640*	\$15,000*	N/A	\$17,597*	\$47,377
SALARY (IF SALARIED) (MAX)	N/A	\$34,400	\$63,130	N/A	\$56,732	\$87,475
AVERAGE HOURLY RATE (IF HOURLY)	\$95	\$98	\$64.58	\$65.20	\$69.12	\$42.70
HOURLY RATE (IF HOURLY) (MIN)	\$95	\$96	\$31.24	\$23	\$19.48	\$29.90
HOURLY RATE (IF HOURLY) (MAX)	\$95	\$100	\$90	\$90	\$95	\$55.50
# OF SCHOOLS REPORTING SALARY	0	2	2	0	6	4
# OF SCHOOLS REPORTING HR WAGE	1	2	3	5	4	2

\*Four (4) schools reported salaries that may be part-time – these were included given their occurrence throughout the dataset

### School Psychologists

- **85.5%** of surveyed schools **have a School Psychologist**
  - **7.9% employ** their School Psychologist(s)
  - **77.6% contract** with their School Psychologist(s)
- The **average salary** across reporting schools that reported salaries is **\$71,403\***
- The **average hourly wage** across reporting schools that reported hourly wages is **\$116.04**

SALARY INFORMATION FOR SCHOOL PSYCHOLOGISTS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
EMPLOYED	0	0	2	1	2	1
CONTRACTED	11	10	10	12	10	6
AVERAGE SALARY (IF SALARIED)	N/A	N/A	\$47,142	\$85,004	\$84,444	\$91,464
SALARY (IF SALARIED) (MIN)	N/A	N/A	\$28,000	\$85,004	\$69,000	\$91,464
SALARY (IF SALARIED) (MAX)	N/A	N/A	\$81,950	\$85,004	\$110,313	\$91,464
AVERAGE HOURLY RATE (IF HOURLY)	\$110	\$101.67	\$112.50	\$110	\$136.25	\$128.33
HOURLY RATE (IF HOURLY) (MIN)	\$75	\$90	\$90	\$80	\$110	\$85
HOURLY RATE (IF HOURLY) (MAX)	\$150	\$110	\$125	\$140	\$165	\$150
# OF SCHOOLS REPORTING SALARY	0	0	3	1	3	1
# OF SCHOOLS REPORTING HR WAGE	4	3	4	6	4	3

\*Two (2) schools reported salaries that may be part-time – these were included given their occurrence throughout the dataset

### Special Education Directors

- **98.7%**<sup>1</sup> of surveyed schools **have a Special Education Director**
  - **25% employ** their Special Education Director(s)
  - **73.7% contract** with their Special Education Director(s)
- The **average salary** across reporting schools that reported salaries is **\$63,693**<sup>2</sup>
- The **average hourly wage** across reporting schools that reported hourly wages is **\$148**

SALARY INFORMATION FOR SPECIAL EDUCATION DIRECTORS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
EMPLOYED	0	1	3	2	7	6
CONTRACTED	13	13	10	11	8	1
AVERAGE SALARY (IF SALARIED)	\$18,187 <sup>2</sup>	\$31,067 <sup>2</sup>	\$51,867 <sup>2</sup>	\$45,979 <sup>2</sup>	\$89,915	\$114,583
SALARY (IF SALARIED) (MIN)	\$15,000 <sup>2</sup>	\$15,000 <sup>2</sup>	\$15,000 <sup>2</sup>	\$15,000 <sup>2</sup>	\$21,150 <sup>2</sup>	\$99,812
SALARY (IF SALARIED) (MAX)	\$21,250 <sup>2</sup>	\$50,000	\$87,720	\$110,000	\$125,000	\$128,796
AVERAGE HOURLY RATE (IF HOURLY)	\$150	\$150	N/A	\$150	\$140	N/A
HOURLY RATE (IF HOURLY) (MIN)	\$150	\$150	N/A	\$150	\$140	N/A
HOURLY RATE (IF HOURLY) (MAX)	\$150	\$150	N/A	\$150	\$140	N/A
# OF SCHOOLS REPORTING SALARY	4	3	7	7	8	6
# OF SCHOOLS REPORTING HR WAGE	2	1	0	1	1	0

<sup>1</sup>Only one (1) school of the 76 surveyed indicated they do not employ or contract with a Special Education Director

<sup>2</sup>14 schools reported salaries that may be part-time – these were included given their occurrence throughout the dataset

## SUPPORT STAFF

### Education Support Professionals/Paraprofessionals (Gen Ed & SPED Classrooms)

- The **average minimum hourly rate** across surveyed schools is **\$18.48**
- The **average maximum hourly rate** across surveyed schools is **\$24.83**

HOURLY WAGES FOR EDUCATION SUPPORT PROFESSIONALS/PARAPROFESSIONALS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE MINIMUM HOURLY WAGE	\$16.99	\$18.71	\$18.39	\$20.22	\$18.32	\$18.01
MIN HOURLY WAGE RANGE (MIN)	\$13	\$14	\$14.05	\$15.30	\$16	\$14.58
MIN HOURLY WAGE RANGE (MAX)	\$21	\$23.29	\$21.50	\$25	\$22	\$22.50
AVERAGE MAXIMUM HOURLY WAGE	\$20.48	\$23.73	\$26.01	\$27.01	\$26.55	\$25.80
MAX HOURLY WAGE RANGE (MIN)	\$14.35	\$17	\$18	\$19.03	\$19.61	\$16.12
MAX HOURLY WAGE RANGE (MAX)	\$28	\$37	\$35.83	\$38.99	\$46	\$36.40

### Receptionists / Secretaries / Administrative Assistants

- The **average minimum hourly rate** across surveyed schools is **\$21.06**
- The **average maximum hourly rate** across surveyed schools is **\$25.15**
- Top job titles** reported: **Assistant (39.5%)**, **Receptionist (13.2%)**, and **Coordinator (10.5%)**

HOURLY WAGES FOR RECEPTIONIST / SECRETARY / ADMINISTRATIVE ASSISTANT						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE MINIMUM HOURLY WAGE	\$19.46	\$23.09	\$22.66	\$20.78	\$19.79	\$18.95
MIN HOURLY WAGE RANGE (MIN)	\$13	\$14	\$18	\$17	\$16	\$15.50
MIN HOURLY WAGE RANGE (MAX)	\$28	\$35	\$27.33	\$26.18	\$30	\$25.75
AVERAGE MAXIMUM HOURLY WAGE	\$20.25	\$25.91	\$26.44	\$26.81	\$25.43	\$23.69
MAX HOURLY WAGE RANGE (MIN)	\$13	\$14	\$23	\$19.54	\$19.75	\$18.54
MAX HOURLY WAGE RANGE (MAX)	\$30	\$40.64	\$30	\$36.66	\$35	\$29.72

### Business Managers

- The **average salary** across reporting schools is **\$68,530**
- For degrees held by Business Managers:
  - 21.3%** have an **associate's degree**
  - 39.3%** have a **bachelor's degree**
  - 19.7%** have a **master's degree**
  - One (1)** has a **master's degree + additional hours**
  - One (1)** has a **doctorate degree**
  - Five (5)** have **no degree**
- Top job titles** reported: **Manager (45.9%)**, **Director (18%)**, and **Coordinator (6.6%)**

HOURLY WAGES FOR BUSINESS MANAGERS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE SALARY	\$38,845	\$61,712	\$70,237	\$64,530	\$76,668	\$95,475
AVERAGE SALARY RANGE (MIN)	\$31,500	\$40,000	\$56,216	\$51,000	\$46,848	\$57,000
AVERAGE SALARY RANGE (MAX)	\$62,132	\$83,000	\$83,000	\$90,369	\$126,264	\$175,000
# OF SCHOOLS REPORTING	6	12	9	13	15	6

## SALARY SYSTEMS, INCREASES, & BONUSES

### Salary Systems for Teachers

- **59.2%** of surveyed schools use a **traditional steps and lanes salary system**
- **6.6%** of surveyed schools use a **performance-based salary system**
- **34.2%** of surveyed schools use **another type of salary system**
  - Schools that indicated using **another type of salary systems** explained their system:
    - **15.4%** use **modified steps and lanes**
    - **15.4%** stated **it depends on the school board and budget**
    - **11.5%** use **base pay + factor increases**
    - **11.5%** stated their salary system is **in development**
    - **7.7%** follow the **market rate**
    - **7.7%** base their system on **various factors (experience, education, etc.)**
    - **Other explanations** mentioned only once: **internal system, salary bands, service/performance/duties, traditional/loyalty system, teacher led, negotiated, and “nothing”**

BASIS FOR SCHOOLS' PROFESSIONAL STAFF (TEACHER) SALARY SYSTEM						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
TRADITIONAL (STEPS & LANES)	5	9	8	8	12	3
PERFORMANCE-BASED	1	0	1	0	2	1
OTHER (SEE LIST ABOVE)	6	6	4	5	1	3

### Counting Previous Work Experience for School's Professional Staff (Teachers)

- **39.5%** of surveyed schools **give credit for every year of previous experience**
- **35.5%** of surveyed schools **give credit for every year of previous experience up to a maximum number of years**
- **4%** of surveyed schools **do not give credit for previous experience**
- **21.1%** of surveyed schools use **other approaches**
  - Schools that indicated using **other approaches** explained their approach: **credit for direct relevant experience, credit for previous year at director discretion, credit every year for licensure shortage areas (others is generally 2:1), negotiated, credit for previous experience but not by year, half of their years of experience, “varies,” “no system,” and “not applicable”**

BASIS FOR SCHOOLS' PROFESSIONAL STAFF (TEACHER) SALARY SYSTEM						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
GIVE CREDIT EVERY YEAR	1	5	5	7	8	4
GIVE CREDIT EVERY YEAR UP TO MAX	5	5	4	5	7	1
DO NOT GIVE CREDIT	1	1	1	0	0	0
OTHER (SEE LIST ABOVE)	6	4	3	1	0	2

## Salary & Wage Increases

- **80.3%** of surveyed schools provided **salary/wage increases in FY24**
- The **average rate of salary/wage increase** across schools reporting an increase is **3.1%**

AVERAGE SALARY/WAGE INCREASE (ONLY SCHOOLS REPORTING AN INCREASE)						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
% OF SALARY/WAGE INCREASE (AVG)	4.3%	2.5%	2.8%	2.6%	3.5%	3.4%
% OF SALARY/WAGE INCREASE (MIN)	1.5%	2%	1%	2%	2%	2%
% OF SALARY/WAGE INCREASE (MAX)	15%	4%	6%	3.2%	8.5%	7%
# OF SCHOOLS WITH AN INCREASE	8	12	12	10	12	7

- **Reported factors** that were the **basis for the salary/wage increases** in FY24:
  - **70.5%** – across the board increases (same amount for all employees)
  - **60.7%** – cost of living adjustment (COLA)
  - **26.2%** – longevity with school
  - **9.8%** – education level
  - **8.2%** – performance/merit based increase
  - **4.9%** – Q Comp
- **Other reported factors** that were the **basis for the salary/wage increases** include: **steps and lane increase, increase in line with state funding increase, and new agreement with teachers union**

TOTAL REASONS FOR SALARY/WAGE INCREASE (ONLY SCHOOLS REPORTING INCREASE)						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
ACROSS THE BOARD INCREASES	3	9	8	8	8	7
COST OF LIVING ADJUSTMENT (COLA)	8	5	9	8	4	3
LONGEVITY WITH SCHOOL	5	1	4	3	1	2
EDUCATION LEVEL	0	0	2	2	1	1
PERFORMANCE/MERIT BASED	2	0	1	0	1	1
Q COMP	1	0	1	0	0	1
# OF SCHOOLS WITH AN INCREASE	8	12	12	10	12	7

## Bonuses & Stipends

- **31.6%** of surveyed schools **provided year-end bonuses/stipends**
- The **basis for year-end bonuses/stipends** includes: **unexpected additional work/responsibilities, goal attainment/performance, Q Comp, board-approved recognition bonus, Great Start grant, and one-time salary adjustment**

TOTAL SCHOOLS THAT PROVIDED YEAR-END BONUSES/STIPENDS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
# PROVIDING BONUSES/STIPENDS	2	2	6	6	5	3

## Payroll Schedules

- **83%** of surveyed schools pay their employees **bi-monthly (24 annual payments)**
  - **9.2%** pay their employees **monthly**
  - **4%** pay their employees **every other week**
  - **One (1) school** pays their employees **weekly**

PAY SCHEDULES BY SCHOOL SIZE						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
PAYS WEEKLY	0%	0%	0%	0%	6.7%	0%
PAYS EVERY OTHER WEEK	0%	0%	7.7%	0%	6.7%	14.3%
PAYS BI-MONTHLY	76.9%	93.3%	76.9%	92.3%	86.7%	85.7%
PAYS MONTHLY	23.1%	6.7%	15.4%	7.7%	0%	0%

## PART 3: BENEFITS INFORMATION

### HEALTH INSURANCE

#### Schools Offering Group Health Insurance Plans to their Employees

- **89.5%** of surveyed schools **offer Group Health Insurance Plans**
  - Of schools that offer health insurance, reported **Group Health Insurance providers** include:
    - **HealthPartners (30.1%)**
    - **Medica (26.5%)**
    - **Blue Cross / Blue Shield (BCBS) (19.1%)**
    - **Public Employee Insurance Program (PEIP) (11.8%)**
    - **Other (11.8%)**
      - **Others cited include: Aetna, United Healthcare, MN Healthcare Consortium, and AmeriHealth (BCBS Network)**
- **87.5%** of surveyed schools that **do not offer Group Health Insurance Plans** offer cash in lieu of Group Health Insurance
  - The **range of cash allowance** reported is **\$2,800-\$8,000**
    - **One (1) school** reported offering **\$450 per month** or **\$650 per month for the Executive Director “to include a dependent”**
- **Two (1) schools** reported they **provide neither option**

SCHOOLS OFFERING GROUP HEALTH INSURANCE PLANS & WHICH PROVIDERS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
OFFERS GROUP HEALTH INS. PLANS	69.2%	86.7%	84.6%	100%	100%	100%
PROVIDER: HEALTHPARTNERS	0	5	5	6	4	1
PROVIDER: MEDICA	5	1	3	3	3	3
PROVIDER: BCBS	4	2	1	2	3	1
PROVIDER: PEIP	0	4	1	0	2	1
PROVIDER: OTHER	0	1	1	2	3	1
OFFERS CASH IN LIEU	23.1%	6.7%	15.4%	7.7%*	0%	0%

\*One (1) school reported offering both Group Health Insurance and “\$1,000 each year into their HSA to offset any health expenses”

#### Employees Utilizing School’s Group Health Insurance Plan

- **61.2%** of reporting school employees **utilize their school’s Group Health Insurance Plan**

% OF EMPLOYEES UTILIZING THEIR SCHOOL'S GROUP HEALTH INSURANCE PLAN						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
UTILIZE SCHOOL'S INSURANCE PLAN	64%	47%	66%	62%	63%	71%
UTILIZE PLAN RANGE (MIN)	20%	3%	25%	12%	39%	59%
UTILIZE PLAN RANGE (MAX)	100%	87%	100%	98%	88%	82%
# OF SCHOOLS REPORTING	9	13	10	12	14	7

### Group Health Insurance Plan Coverage for Spouses / Dependents / Domestic Partners

- The **average amount of premium coverage for employees only** across reporting schools that offer Group Health Insurance is **79.8%**
- The **average amount of premium coverage for spouses** across reporting schools that offer Group Health Insurance is **24.4%**
- The **average amount of premium coverage for dependents** across reporting schools that offer Group Health Insurance is **28.5%**

FOR SCHOOLS PROVIDING HEALTH INSURANCE: % OF PREMIUMS SCHOOLS PAY						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
EMPLOYEE ONLY (AVG)	79%	72%	82%	85%	75%	95%
EMPLOYEE ONLY RANGE (MIN)	0%	40%	25%	45%	0%	80%
EMPLOYEE ONLY RANGE (MAX)	100%	100%	100%	100%	100%	100%
SPOUSE (AVG)	20%	24%	12%	25%	29%	45%
SPOUSE RANGE (MIN)	0%	0%	0%	0%	0%	0%
SPOUSE RANGE (MAX)	60%	85%	50%	70%	78%	70%
DEPENDENTS (AVG)	20%	24%	19%	32%	32%	50%
DEPENDENTS RANGE (MIN)	0%	0%	0%	0%	0%	0%
DEPENDENTS RANGE (MAX)	60%	85%	75%	70%	76%	70%
# OF SCHOOLS REPORTING	8	13	10	12	14	6

### Health Insurance Premium Rate Change Since Last Policy Renewal

- The **average amount of health insurance premium rate change at last policy renewal** across surveyed schools that offer Group Health Insurance is **9.3%\***
  - 95.5%** of schools reporting rates changes at last renewal reported a rate **increase**
  - 5.5%\*** of schools reporting rates changes at last renewal reported a rate **decrease**

FOR SCHOOLS PROVIDING HEALTH INSURANCE: PREMIUM RATE CHANGE AT LAST RENEWAL						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE PREMIUM INCREASE RATE	8.6%	9.2%	4.4%	7.8%	10%	14.8%
CHANGE IN PREMIUM RANGE (MIN)	3%	-2%	-30%	3%	-7%	8%
CHANGE IN PREMIUM RANGE (MAX)	15.8%	25%	15%	17%	29%	23.4%

\*73 schools' rates increased; three (3) schools' rates decreased – average rate of decrease is -13%



## ADDITIONAL BENEFITS FOR FULL-TIME EMPLOYEES

### Additional Benefits for Full-Time Employees

- **89.5%** of surveyed schools provide **Dental Insurance**
  - The **average % of the premium a providing school covers** is **66%**
- **75%** of surveyed schools provide **Vision Insurance**
  - The **average % of the premium a providing school covers** is **49.6%**
- **39.5%** of surveyed schools provide **Prescription Coverage**
  - The **average % of the premium a providing school covers** is **59.2%**
- **81.6%** of surveyed schools provide **Short-Term Disability**
  - The **average % of the premium a providing school covers** is **86%**
- **81.6%** of surveyed schools provide **Long-Term Disability**
  - The **average % of the premium a providing school covers** is **93.5%**
- **19.7%** of surveyed schools provide **Long-Term Care**
  - The **average % of the premium a providing school covers** is **45.7%**
- **89.5%** of surveyed schools provide **Life Insurance**
  - The **average % of the premium a providing school covers** is **87.9%**
  - **88.9%** of schools that reported providing Life Insurance **cover 100% of the premium**
- **47.4%** of surveyed schools provide **Health Savings Account (HSA) Employer Contribution**
  - The **average % of the premium a providing school covers** is **30.4%**

OF SCHOOLS THAT OFFER ADDITIONAL BENEFITS FOR FULL-TIME EMPLOYEES						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
OFFER DENTAL INSURANCE	61.5%	93.3%	84.6%	100%	100%	100%
% DENTAL PREM. COVERAGE (AVG)	39%	69.6%	81.5%	67.3%	60.7%	87.5%
% DENTAL PREM. COV. RANGE (MIN)	5%	5%	5%	5%	5%	65%
% DENTAL PREM. COV. RANGE (MAX)	100%	100%	100%	100%	100%	100%
OFFER VISION INSURANCE	46.2%	73.3%	69.2%	69.2%	100%	100%
% VISION PREM. COVERAGE (AVG)	19.3%	66.4%	63.3%	66.7%	35.9%	100%
% VISION PREM. COV. RANGE (MIN)	5%	5%	5%	5%	5%	100%
% VISION PREM. COV. RANGE (MAX)	80%	100%	100%	100%	100%	100%
OFFER PRESCRIPTION COVERAGE	23.1%	40%	7.7%	30.8%	66.7%	85.7%
% PRESCRIPTION PREM. COV. (AVG)	20.8%	78.3%	100%	88.8%	43.6%	100%
% PRES. PREM. COV. RANGE (MIN)	5%	60%	100%	75%	5%	100%
% PRES. PREM. COV. RANGE (MAX)	100%	100%	100%	100%	100%	100%
OFFER SHORT-TERM DISABILITY	53.8%	66.7%	84.6%	92.3%	100%	100%
% ST DISABILITY COVERAGE (AVG)	57.8%	100%	100%	89.4%	81.5%	100%
% ST DISABILITY COV. RANGE (MIN)	5%	100%	100%	5%	5%	100%
% ST DISABILITY COV. RANGE (MAX)	100%	100%	100%	100%	100%	100%
OFFER LONG-TERM DISABILITY	61.5%	66.7%	92.3%	92.3%	86.7%	100%
% LT DISABILITY COVERAGE (AVG)	62%	100%	100%	100%	100%	100%
% LT DISABILITY COV. RANGE (MIN)	5%	100%	100%	100%	100%	100%
% LT DISABILITY COV. RANGE (MAX)	100%	100%	100%	100%	100%	100%

OFFER LONG-TERM CARE	23.1%	6.7%	15.4%	23.1%	20%	42.9%
% LT CARE COVERAGE (AVG)	32.1%	100%	100%	5%	36.7%	100%
% LT CARE COVERAGE RANGE (MIN)	5%	100%	100%	5%	5%	100%
% LT CARE COVERAGE RANGE (MAX)	100%	100%	100%	5%	100%	100%
OFFER LIFE INSURANCE	61.5%	93.3%	100%	100%	93.3%	100%
% LIFE INSURANCE COVERAGE (AVG)	65.5%	91.4%	92.1%	100%	83.5%	100%
% LIFE INSUR. COV. RANGE (MIN)	5%	5%	5%	100%	5%	100%
% LIFE INSUR. COV. RANGE (MAX)	100%	100%	100%	100%	100%	100%
OFFER HSA EMPL. CONTRIBUTION	61.5%	93.3%	23.1%	61.5%	60%	57.1%
% OF HSA CONTRIBUTION (AVG)	5%	48.8%	30%	57.5%	30.8%	50%
% OF HSA CONTR. RANGE (MIN)	5%	5%	30%	5%	5%	50%
% OF HSA CONTR. RANGE (MAX)	5%	100%	30%	100%	100%	50%

### Retirement Savings Plans Offered Beyond TRA/PERA

- **55.3%** of surveyed schools **offer full-time employees retirement savings plans beyond TRA/PERA**
  - **53.9%** of surveyed school offer **403(b)**
  - **5.3%** of surveyed schools offer both **403(b)** and **IRA (Simple/Roth)**
  - **One (1) school** just offers **IRA (Simple/Roth)**
  - **One (1) school** just offers **401K**

SCHOOLS OFFERING RETIREMENT SAVINGS PLANS BEYOND TRA/PERA						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
OFFERS 403(B)	7.7%	40% <sup>1</sup>	38.5%	76.9%	80%	100%
OFFERS IRA (SIMPLE/ROTH)	0%	6.7%	15.4%	7.7%	0%	14.3%
OFFERS BOTH 403(B) AND IRA (S/R)	0%	6.7%	7.7%	7.7%	0%	14.3% <sup>2</sup>

<sup>1</sup>One (1) school offers a 457(b) in addition to 403(b)

<sup>2</sup>One (1) school offers a 457(b) in addition to 403(b) and IRA (Simple/Roth)

## LEAVE FOR FULL-TIME EMPLOYEES

### Paid Time Off (PTO) vs. Separate Paid Leave

A compensation package for employees includes paid leave. Outside of holidays, paid leave includes sick (ESST), personal, and vacation days. Schools either separate the leave into sick (ESST), personal, and vacation days, or combine them as paid time off (PTO).

- **73.7%** of surveyed schools have a **combined PTO policy (personal/sick/vacation)**
- **25%** of surveyed schools have a **separate PTO policy for personal, sick, and vacation**

PTO POLICIES OFFERED BY SCHOOLS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
OFFER COMBINED PTO	100%	66.7%*	100%	61.5%	53.3%	57.1%
OFFER SEPARATE PTO	0%	26.7%*	0%	38.5%	46.7%	42.9%

\*One (1) school reported: "Exempt staff get PTO (12 month employees get 15 combined sick, personal and vacation days and 10 month employees get 10 days) / non-exempt employees get ESST / unlimited bereavement to all staff"

- The **average number of combined PTO days** offered to **all full-time employees** each year by reporting schools that combine PTO is **12.1**
  - The **average number of combined PTO days** offered to **full-time teachers** each year by reporting schools that combine PTO is **11.3**
  - The **average number of combined PTO days** offered to **other full-time employees** each year by reporting schools that combine PTO is **13**

COMBINED PAID TIME OFF (PTO) DAYS OFFERED TO FULL-TIME EMPLOYEES PER YEAR						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE PTO (FT TEACHERS)	10.8	10.9*	10.8	10.3	10.4	10.5
PTO RANGE (FT TEACHERS)	6-19	7-18*	8-20	8-12	10-22	10-11
AVERAGE PTO (OTHER FT EMPL.)	10.6	10.2*	10.8	11	12.1	10.5
PTO RANGE (OTHER FT EMPL.)	5-19	5-18*	6-20	6-36	10-16	10-11

\*One (1) school reported: "Exempt staff get PTO (12 month employees get 15 combined sick, personal and vacation days and 10 month employees get 10 days) / non-exempt employees get ESST / unlimited bereavement to all staff"

- The **average number of sick/ESST days** offered to **all full-time employees** each year by reporting schools that separate PTO is **8.9**
  - The **average number of sick/ESST days** offered to **full-time teachers** each year by reporting schools that separate PTO is **9.1**
  - The **average number of sick/ESST days** offered to **other full-time employees** each year by reporting schools that separate PTO is **8.7**
- The **average number of personal days** offered to **all full-time employees** each year by reporting schools that separate PTO is **4.9**
  - The **average number of personal days** offered to **full-time teachers** each year by reporting schools that separate PTO is **5.2**
  - The **average number of personal days** offered to **other full-time employees** each year by reporting schools that separate PTO is **4.6**
- The **average number of vacation days** offered to **all full-time employees** each year by reporting schools that separate PTO is **3.1**<sup>1234</sup>
  - The **average number of vacation days** offered to **full-time teachers** each year by reporting schools that separate PTO is **0.3**<sup>1234</sup>
  - The **average number of vacation days** offered to **full-time teachers** each year by reporting schools that separate PTO is **5.8**

SEPARATED LEAVE OFFERED TO FULL-TIME EMPLOYEES PER YEAR						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVG SICK/ESST DAYS (FT TEACHERS)	N/A	7.8	N/A	8.2	10.3	9.3
SICK/ESST RANGE (FT TEACHERS)	N/A	7-10	N/A	6-12	8-12	6-14
PERSONAL DAYS (FT TEACHERS)	N/A	5.3	N/A	5.2	6	3
PERSONAL RANGE (FT TEACHERS)	N/A	3-10	N/A	2-14	2-20	0-6
VACATION DAYS (FT TEACHERS)	N/A	0.8 <sup>1</sup>	N/A	0 <sup>2</sup>	0.3 <sup>3</sup>	0 <sup>4</sup>
VACATION RANGE (FT TEACHERS)	N/A	0-3 <sup>1</sup>	N/A	0 <sup>2</sup>	0-2 <sup>3</sup>	0 <sup>4</sup>
SICK/ESST DAYS (OTHER FT EMPL.)	N/A	6	N/A	8.2	10.8	8.7
SICK/ESST RANGE (OTHER FT EMPL.)	N/A	7-10	N/A	6-12	9-12	6-12
PERSONAL DAYS (OTHER FT EMPL.)	N/A	3	N/A	5	6.6	1.3
PERSONAL RANGE (OTHER FT EMPL.)	N/A	0-5	N/A	2-13	0-20	0-2
AVG VACA. DAYS (OTHER FT EMPL.)	N/A	3.3	N/A	2	9	8.3
VACATION RANGE (OTHER FT EMPL.)	N/A	0-10	N/A	0-10	0-20	0-25

<sup>1</sup>Three (3) schools reported zero (0) vacation days for teachers but reported providing sick/ESST days (7-10) and personal days (3-10)

<sup>2</sup>All five (5) schools reported zero (0) vacation days for teachers but reported providing sick/ESST days (6-12) and personal days (2-14)

<sup>3</sup>Six (6) schools reported zero (0) vacation days for teachers but reported providing sick/ESST days (8-12) and personal days (2-20)

<sup>4</sup>Three (3) schools reported zero (0) vacation days for teachers but reported providing sick/ESST days (6-14) and personal days (0-6)

### Paid Time Off (PTO) & Separate Leave Carry Over

- **80.3%** of surveyed schools allow **FT teachers to carry over unused leave/PTO**
- **75%** of surveyed schools allow other **FT employees to carry over unused leave/PTO**

SEPARATED LEAVE OFFERED TO FULL-TIME EMPLOYEES PER YEAR						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
OFFERS FT TEACHERS CARRY OVER	92.3%	80%	84.6%	84.6%	73.3%	57.1%
OFFERS FT OTHER EMPLOYEES CO	76.9%	73.3%	84.6%	76.9%	73.3%	57.1%

### Paid Time Off (PTO) Accrual

- The following was reported as **maximum PTO days a full-time teacher can accrue** by schools reporting at least one day [days (number of schools reporting)]:
  - **< 100 Students:** 2 (1), 5 (1), 10 (2), 12 (1), 14 (1), 20 (1), and 21+ (5)
  - **100-174 Students:** 2 (1), 3 (1), 5 (2), 10 (2), 15 (1), 21+ (1)
  - **175-249 Students:** 10 (3), 15 (2), 20 (2), 21+ (4)
  - **250-499 Students:** 5 (1), 7 (1), 10 (1), 12 (2), 20 (1), 21+ (3)
  - **500-999 Students:** 10 (3), 12 (2), 20 (1)
  - **> 1,000 Students:** 6 (1), 7 (1), 11 (1), 18 (1)
- The following was reported as **maximum PTO days other full-time employees can accrue** by schools reporting at least one day [days (number of schools reporting)]:
  - **< 100 Students:** 2 (1), 5 (1), 10 (1), 12 (1), 14 (1), 20 (1), 21+ (5)
  - **100-174 Students:** 2 (1), 3 (1), 5 (2), 7 (1), 10 (2), 12 (1), 15 (1), 21+ (1)
  - **175-249 Students:** 10 (3), 15 (2), 20 (2), 21+ (4)
  - **250-499 Students:** 5 (1), 7 (1), 8 (1), 10 (1), 12 (1), 20 (1), 21+ (3)

- **500-999 Students:** 10 (4), 14 (1), 15 (1), 20 (1)
- **> 1,000 Students:** 6 (1), 11 (1), 18 (1)

### Separate Leave Accrual

- The following was reported as **maximum sick/ESST days full-time teachers can accrue** by schools reporting at least one day [days (number of schools reporting)]:
  - **< 100 Students:** N/A
  - **100-174 Students:** 5 (1), 7 (1), 10 (1), 21+ (2)
  - **175-249 Students:** N/A
  - **250-499 Students:** 21+ (3)
  - **500-999 Students:** 10 (2), 21+ (5)
  - **> 1,000 Students:** 10 (1), 21+ (1)
- The following was reported as **maximum sick/ESST days other full-time employees can accrue** by schools reporting at least one day [days (number of schools reporting)]:
  - **< 100 Students:** N/A
  - **100-174 Students:** 5 (1)
  - **175-249 Students:** N/A
  - **250-499 Students:** 21+ (2)
  - **500-999 Students:** 10 (1), 21+ (5)
  - **> 1,000 Students:** 10 (1), 21+ (1)
- The following was reported as **personal days full-time teachers can accrue** by schools reporting at least one day [days (number of schools reporting)]:
  - **< 100 Students:** N/A
  - **100-174 Students:** 5 (2), 10 (1), 18 (1)
  - **175-249 Students:** N/A
  - **250-499 Students:** 6 (1), 12 (1), 21+ (1)
  - **500-999 Students:** 1 (1), 2 (2), 5 (2), 10 (2), 21+ (1)
  - **> 1,000 Students:** 7 (1)
- The following was reported as **personal days other full-time employees can accrue** by schools reporting at least one day [days (number of schools reporting)]:
  - **< 100 Students:** N/A
  - **100-174 Students:** 5 (1), 18 (1)
  - **175-249 Students:** N/A
  - **250-499 Students:** 5 (1), 12 (1), 21+ (1)
  - **500-999 Students:** 2 (2), 5 (1), 10 (2), 21+ (1)
  - **> 1,000 Students:** 7 (1)

- The following was reported as **vacation days full-time teachers can accrue** by schools reporting at least one day [days (number of schools reporting)]:
  - < 100 Students: N/A
  - 100-174 Students: 5 (1)
  - 175-249 Students: N/A
  - 250-499 Students: N/A
  - 500-999 Students: 10 (1)
  - > 1,000 Students: N/A
- The following was reported as **vacation days other full-time employees can accrue** by schools reporting at least one day [days (number of schools reporting)]:
  - < 100 Students: N/A
  - 100-174 Students: 5 (1), 21+ (1)
  - 175-249 Students: N/A
  - 250-499 Students: 5 (1)
  - 500-999 Students: 10 (1), 20 (1), 21+ (3)
  - > 1,000 Students: 21+ (1)

### Earned Sick & Safe Time (ESST) Carry Over

- 43.4% of surveyed schools **allow hours to accrue and carry over from year to year**
- 14.5% of surveyed schools **front loads at least 80 hours ESST with no pay out or carryover**
- 10.5% of surveyed schools **front loads at least 48 hours ESST with pay out no carryover**
- 31.6% of surveyed schools report using **another method**, which includes:
  - Frontload, carry over and payout (37.5%)
  - Frontload and carry over (45.8%)

EARNED SICK & SAFE TIME (ESST) ACCRUAL & CARRY OVER POLICIES						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
YEAR-TO-YEAR ACCRUAL & CO	46.2%	33.3%	30.8%	76.9%	46.7%	14.3%
FRONT LOAD 48 HRS / PO / NO CO	0%	6.7%	15.4%	0%	20%	28.6%
FRONTLOAD 80 HRS / NO PO OR CO	23.1%	6.7%	7.7%	7.7%	6.7%	42.9%
OTHER	30.8%	53.3%	38.5%	15.4%	26.7%	14.3%

## ADDT'L BENEFITS & LEAVE FOR PART-TIME EMPLOYEES

### Schools Offering Benefits and Leave to Part-Time Employees

- 38.2% of surveyed schools offer **benefits** to eligible part-time employees
- 39.5% of reporting schools offer **leave** to eligible part-time employees

SCHOOLS OFFERING BENEFITS TO PART-TIME EMPLOYEES						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
OFFER BENEFITS TO PT EMPLOYEES	38.5%	53.3%	30.8%	46.2%	20%	42.9%
OFFER LEAVE TO PT EMPLOYEES	46.2%	20%	53.9%	30.8%	40%	57.1%

- The **average number of combined PTO days** offered to **all part-time employees** each year by schools that offer benefits to part-time employees is **5.9**
  - The **average number of combined PTO days** offered to **part-time teachers** each year by reporting schools that offer benefits to part-time teachers is **5.7**
  - The **average number of combined PTO days** offered to **other part-time employees** each year by reporting schools that offer benefits to part-time employees is **6.1**

COMBINED PAID TIME OFF (PTO) DAYS OFFERED TO PART-TIME EMPLOYEES PER YEAR						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVERAGE PTO (PT TEACHERS)	6.5	5*	6.5	6*	5	3
PTO RANGE (PT TEACHERS)	5-8	5*	4-10	6*	5	2-5
AVERAGE PTO (OTHER PT EMPL.)	7.4	5*	6.5	6*	6.7	3
PTO RANGE (OTHER PT EMPL.)	6-10	5*	4-10	6*	5-10	2-5

\*Only one (1) school reported data

- The **average number of sick/ESST days** offered to **all part-time employees** each year by schools that reported offering sick/ESST to part-time employees is **6.8**
  - The **average number of sick/ESST days** offered to **part-time teachers** each year by schools that reported offering sick/ESST days to part-time teachers is **6.5**
  - The **average number of sick/ESST days** offered to **other part-time employees** each year by schools that reported offering sick/ESST days to part-time employees is **7.2**
- The **average number of personal days** offered to **all part-time employees** each year by schools that reported offering personal days to part-time employees is **4.1**
  - The **average number of personal days** offered to **part-time teachers** each year by schools that reported offering personal days to part-time teachers is **3.8**
  - The **average number of personal days** offered to **other part-time employees** each year by schools that reported offering personal days to part-time employees is **4.5**
- The **average number of vacation days** offered to **all part-time employees** each year by schools that reported offering vacation days to part-time employees is **5.8**
  - The **average number of personal days** offered to **part-time teachers** each year by schools that reported offering vacation days to part-time teachers is **5**
  - The **average number of personal days** offered to **other part-time employees** each year by schools that reported offering vacation days to part-time employees is **6.7**

SEPARATED LEAVE OFFERED TO PART-TIME EMPLOYEES PER YEAR						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
AVG SICK/ESST DAYS (PT TEACHERS)	5*	6.3	N/A	7.7	6.5	5.5
SICK/ESST RANGE (PT TEACHERS)	5*	5-7	N/A	5-12	5-15+	5-6
PERSONAL DAYS (PT TEACHERS)	5*	4.3	7*	2.7	3.7	2*
PERSONAL RANGE (PT TEACHERS)	5*	3-5	7*	1-4	3-5	2*
VACATION DAYS (PT TEACHERS)	5*	5*	N/A	N/A	5*	N/A
VACATION RANGE (PT TEACHERS)	5*	5*	N/A	N/A	5*	N/A
SICK/ESST DAYS (OTHER PT EMPL.)	10*	6	N/A	7.7	7.7	5.5
SICK/ESST RANGE (OTHER PT EMPL.)	10*	5-7	N/A	5-12	5-15+	5-6
PERSONAL DAYS (OTHER PT EMPL.)	10*	5	7*	2.7	4	2*
PERSONAL RANGE (OTHER PT EMPL.)	10*	5	7*	1-4	3-5	2*
AVG VACA. DAYS (OTHER PT EMPL.)	10*	5*	N/A	N/A	5*	N/A
VACATION RANGE (OTHER PT EMPL.)	10*	5*	N/A	N/A	5*	N/A

\*Only one (1) school reported data

### Qualifying for Benefits

- The **average number of hours a part-time employee must work per week in order to qualify for benefits** at reporting schools is **26.3 hours**

HOURS A PART-TIME EMPLOYEE MUST WORK TO QUALIFY FOR BENEFITS						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
LESS THAN 15 HOURS	0	1	0	0	0	0
15-20 HOURS	4	4	1	4	1	0
21-25 HOURS	2	0	1	0	3	1
26-30 HOURS	2	2	5	4	6	6
MORE THAN 30 HOURS	1	2	4	0	0	0
AVERAGE HOURS	23.7	23.5	29.7	25	27.2	29
RANGE (MIN-MAX)	15-32	13-35	20-32	20-30	20-30	25-30
% OF SCHOOLS REPORTING	9	9	11	8	10	7

### Additional Benefits for Part-Time Employees

- 70.3%** of reporting schools that provide benefits to PT employees offer **Health Insurance**
  - The **average % of the premium a providing school covers** is **81.4%**
- 70.3%** of reporting schools that provide benefits to PT employees offer **Dental Insurance**
  - The **average % of the premium a providing school covers** is **63.5%**
- 62.2%** of reporting schools that provide benefits to PT employees offer **Vision Insurance**
  - The **average % of the premium a providing school covers** is **38%**
- 30.6%** of reporting schools that provide benefits to PT employees offer **Prescription Cov.**
  - The **average % of the premium a providing school covers** is **%**
- 62.2%** of reporting schools that provide benefits to PT employees offer **Short-Term Disab.**
  - The **average % of the premium a providing school covers** is **%**



- **59.5%** of reporting schools that provide benefits to PT employees offer **Long-Term Disability**
  - The **average % of the premium a providing school covers** is %
- **67.6%** of reporting schools that provide benefits to PT employees offer **Life Insurance**
  - The **average % of the premium a providing school covers** is **100%**
- **44.4%** of reporting schools that provide benefits to PT employees offer **Retirement/Savings**
  - The **average % of the premium a providing school covers** is **11%**

OF SCHOOLS THAT OFFER ADDITIONAL BENEFITS FOR PART-TIME EMPLOYEES...						
SCHOOL SIZE	< 100 STUDENTS	100-174 STUDENTS	175-249 STUDENTS	250-499 STUDENTS	500-999 STUDENTS	> 1000 STUDENTS
OFFER MEDICAL INSURANCE	50%	87.5%	67.7%	71.4%	75%	75%
% MEDICAL PREM. COVERAGE (AVG)	86.7%	70%	81.3%	91.7%	96.7%	73.3%
% MEDICAL PREM. COV. RANGE (MIN)	80%	30%	70%	80%	90%	50%
% MED. PREM. COV. RANGE (MAX)	100%	100%	100%	100%	100%	90%
OFFER DENTAL INSURANCE	50%	100%	67.7%	57.1%	75%	75%
% DENTAL PREM. COVERAGE (AVG)	80%	65.8%	53.8%	97.5%	63.3%	38.3%
% DENTAL PREM. COV. RANGE (MIN)	80%	30%	0%	95%	0%	0%
% DENTAL PREM. COV. RANGE (MAX)	80%	100%	80%	100%	100%	65%
OFFER VISION INSURANCE	50%	87.5%	67.7%	42.9%	50%	75%
% VISION PREM. COVERAGE (AVG)	40%	68.3%	0%	47.5%	0%	95%
% VISION PREM. COV. RANGE (MIN)	0%	30%	0%	0%	0%	90%
% VISION PREM. COV. RANGE (MAX)	80%	100%	0%	95%	0%	100%
OFFER PRESCRIPTION COVERAGE	33.3%	71.4%	0%	40%	50%	0%
% PRESCRIPTION PREM. COV. (AVG)	N/A	75%	N/A	80%	0%	N/A
% PRES. PREM. COV. RANGE (MIN)	N/A	50%	N/A	80%	0%	N/A
% PRES. PREM. COV. RANGE (MAX)	N/A	100%	N/A	80%	0%	N/A
OFFER SHORT-TERM DISABILITY	50%	87.5%	67.7%	57.1%	50%	50%
% ST DISABILITY COVERAGE (AVG)	100%	90%	100%	75%	100%	100%
% ST DISABILITY COV. RANGE (MIN)	100%	50%	100%	0%	100%	100%
% ST DISABILITY COV. RANGE (MAX)	100%	100%	100%	100%	100%	100%
OFFER LONG-TERM DISABILITY	50%	87.5%	50%	57.1%	50%	50%
% LT DISABILITY COVERAGE (AVG)	100%	91.7%	100%	100%	100%	100%
% LT DISABILITY COV. RANGE (MIN)	100%	50%	100%	100%	100%	100%
% LT DISABILITY COV. RANGE (MAX)	100%	100%	100%	100%	100%	100%
OFFER LIFE INSURANCE	50%	87.5%	67.7%	71.4%	75%	50%
% LIFE INSURANCE COVERAGE (AVG)	100%	100%	100%	100%	100%	100%
% LIFE INSUR. COV. RANGE (MIN)	100%	100%	100%	100%	100%	100%
% LIFE INSUR. COV. RANGE (MAX)	100%	100%	100%	100%	100%	100%
OFFER SAVINGS/RETIREMENT	25%	42.9%	25%	57.1%	80%	50%
% OF SAV./RET. COVERAGE (AVG)	5%	100%	0%	0%	1.67%	0%
% OF SAV./RET. COV. RANGE (MIN)	5%	100%	0%	0%	0%	0%
% OF SAV./RET. COV. RANGE (MAX)	5%	100%	0%	0%	5%	0%

# SURVEY PARTICIPANTS

Achieve Language Academy	Minnesota Online High School
Arcadia Charter School	Minnesota Transitions Charter School
Art and Science Academy	Minnesota Wildflower Montessori School
Augsburg Fairview Academy	Modern Montessori Charter School
Avalon Charter School	New City School
Beacon Academy	New Discoveries Montessori Academy
BlueSky Online Charter School	New Heights Schools
Bluffview Montessori School	New Millennium Academy
Career Pathways	North Shore Community School
Central Lakes Adventure School	Northwest Passage High School
Community of Peace Academy	Nova Classical Academy
Cornerstone Montessori Elementary School	Oak Hill Montessori Community School
Creekstone Montessori	Oshki Ogimaag Charter School
Crosslake Community School	PACT Charter School
Cyber Village Academy	Paladin Career & Technical High School
DaVinci Academy of Arts and Science	Parnassus Preparatory School
Discovery Woods	Partnership Academy
Duluth Edison Charter Schools	PiM Arts High School
Eagle Ridge Academy	Prairie Creek Community School
East Range Academy of Technology and Science	Prodeo Academy
EdVisions Off Campus	Ridgeway Community School
Excell Academy for Higher Learning	River Grove
Face to Face Academy	Riverway Learning Community
FIT Academy	Rollingstone Community School
Glacial Hills Elementary School	SAGE Academy
Global Academy	Schoolcraft Learning Community
Great River School	Seven Hills Preparatory Academy
Hope Community Academy	Sojourner Truth Academy
Horizon Science Academy - Twin Cities	St. Paul City School
International Spanish Language Academy	St. Paul School of Northern Lights
Kaleidoscope Charter School	Swan River Montessori Charter School
Kato Public Charter School	Technical Academies of Minnesota
La Crescent Montessori and STEM	Three Rivers Montessori
Lakes International Language Academy	Trek North High School Inc
Metro Deaf School	TRIO Wolf Creek Distance Learning Charter Sch.
Minnesota Excellence in Learning Academy	Twin Cities German Immersion School
Minnesota Math and Science Academy	World Learner School
Minnesota New Country School	Yinghua Academy

## Swan River Montessori Charter School

Adopted: 9.20.17

Revised: 10.10.23

### Compensation for Substitute Teachers & Support Staff Policy

#### PURPOSE

The purpose of this policy is to establish fair and consistent starting base compensation rates for any and all people serving in a licensed and/or non-licensed substitute capacity including, but not limited to, teachers, support staff members, administrative assistants, and custodians. This policy also addresses if the substitute qualifies for annual wage increases comparable or equal to SRMCS employees.

#### DEFINITIONS

“Licensed (Substitute) Teacher” is defined as an educator who holds a valid teaching license in the State of Minnesota via the Department of Education Division of Licensing. This person is qualified to sub in any capacity for Swan River Montessori Charter School (SRMCS).

“Non-Licensed (Substitute) Teacher” is defined as an educator who does not hold a valid teaching license in the State of Minnesota or elsewhere. This person is qualified to sub in any capacity that does not require a valid teaching license.

“Long Term Office Staff” is defined as a temporary employee who is given the general administrative responsibilities of the school office. This employee must be working a minimum of 15 hours per week in the office to be considered long term.

“Licensed Support Staff (Substitute) Teacher” is defined as an educator who is employed by SRMCS in a support staff position (special education program paraprofessional or classroom assistant) and holds a valid license in the State of Minnesota that allows him/her to sub in place of an absent lead teacher.

#### POLICY

Starting base compensation rates for substitutes are as follows:

Substitute Capacity	Initial Base Compensation Rate	Qualifies for Compensation Rate Increases
Licensed Teacher	\$200.00 per day	No
Non-Licensed Staff	\$16.50 per hour	No
Long term Office Staff	\$19.00	No
Licensed Support Staff Teacher	Employee’s current year contracted hourly wage + \$60.00/day	Yes



## OSPREY WILDS • CHARTER SCHOOL DIVISION

1730 New Brighton Blvd, Suite 507, PMB 196 • Minneapolis, MN 55413  
(612) 331-4181

The authorizing mission of Osprey Wilds is to ensure quality academic and environmental literacy outcomes for Minnesota students through effective charter school authorizing.

May 9<sup>th</sup>, 2025

Swan River Montessori Charter School  
Attn: Board Chair  
500 Maple St.  
Monticello, MN 55362

re: OW Site Visit Follow-Up

Dear Board of Directors of Swan River Montessori Charter School,

Thank you for hosting me and Addie Mazza on an April 15, 2025 site visit to Swan River Montessori Charter School (SRM). We enjoyed being in your learning community and speaking with students and staff. As you know, these visits are an essential part of our authorizing work. They allow us to observe classrooms, tour the facility, and spend time meeting with staff, students, board members and others with whom we don't usually have the opportunity to engage.

The information we gather from our visits helps inform the school's Academic, Environmental Education, Financial, and Operations Performance Evaluations, and ultimately the Renewal Performance Evaluation and charter renewal. I want to communicate a few key observations that the board and school staff may consider to inform SRM's continued improvement. Observations below are aligned to OW's performance evaluation frameworks, which you can find on the [OW website](#).

Operations Indicator Area 1.2 Instructional Practices: Does the school implement instructional practices that focus on student achievement?

- Instructional practices observed on the site visit align with the school's Exhibit D, Description of Educational Program of the charter contract, including mixed aged classrooms, offerings of structured choice in learning activities, and teacher/director-led presentation of Montessori lessons with hands-on materials and resources.
- In addition to the hands-on learning materials and choice activities curated in the prepared Montessori environment, teachers employed instructional practices designed to actively engage students and enhance learning. Lead teachers presented works to students who then chose works to repeat. Teachers asked students questions like "what do we do next?" upon completion of their work, supporting students to take ownership of their learning process. Students generally had the flexibility to move around the room and transitioned independently from one work to the other, asking for help from peers and guides when needed.
- The school has created a scope and sequence that aligns Montessori works with the relevant MN state standards for instruction. Each lead teacher uses their own tracking process to document student progress through the works.

- Since the last Osprey Wilds site visit to the school, the Multi-tiered System of Support (MTSS) and the (RTI) processes for academic intervention and differentiation have been refined and strengthened schoolwide. Teachers expressed confidence in understanding and leveraging both systems to support students to get what they need. Now that these systems are in place for academic support, the school expressed a desire to continue to clarify and explore supports for students' social emotional needs as well.

Operations Indicator Area 1.7 Environmental Education Program: Does the school implement values and strategies that foster learning and create environmentally literate people who engage in creating healthy outcomes for individuals, communities, and the Earth?

- The school employs environmental education (EE) as a strategy for teaching and learning embedded within its Montessori curriculum and through a dedicated EE 'special' weekly class. The dedicated class time for environmental education has reinforced the school's culture of environmental sustainability. Next year and beyond, the goal is to increase EE class time to better support the completion of projects and initiatives that otherwise take a long time to complete.
- Last school year, core infrastructure and data for the school's EE systems was lost when the EE Coordinator stopped working at the school and took their data with them. This year, the school appointed a new EE Coordinator with plans to split the role between two teachers next year, each supporting specific grade bands (CH, E1, E2). The new EE Coordinator has established a google drive for the EE program to ensure that program infrastructure like data tracking spreadsheets, resources, and rubrics can be accessed and updated regardless of staff turnover. The school's efforts to improve the systems for tracking EE activities and progress toward the school's environmental literacy goals has led to improved coordination and clarity for teaching staff.
- At the outset of the year, SRM scheduled time to provide staff training on expectations for the EE program. In future years, the school could increase staff capacity through hands-on, environmentally-focused professional development opportunities. While some staff feel comfortable leading EE activities, providing consistent training on the natural alignment between the Montessori pedagogy and EE would support staff to feel more confident integrating EE into their instruction.
- The school has several EE related initiatives and elements: garden beds by the playground, a nature playground, and a gazebo that is leveraged for some outdoor learning activities. This year the school highlighted the theme of conservation in efforts to support more sustainable operations. Signs related to previous learning activities remind students to conserve water, turn out the lights, and unplug 'vampire' appliances to save energy. In addition, there was a unit on recycling behaviors.
- Students described a range of environmental learning experiences, including visits to local nature centers and environmental learning centers, visits from the reptile center, learning about recycling and carbon footprints, and science projects about endangered animals. These environmental learning experiences are not only building content knowledge but also fostering student voice and curiosity which are ingredients for environmental literacy.

Operations Indicator Area 1.9 Special Education: Does the school protect the rights of students with disabilities and comply with applicable requirements?

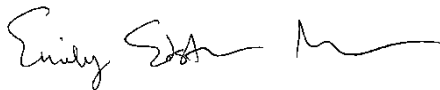
- The special education program is functioning at a high level and staff are intentional about improving their practice to best leverage the Montessori Method in supporting students with disabilities. Staff collaborate closely with each other and the special education Director, tracking IEP minutes and maintaining compliance. The school uses appropriate systems for documentation and communication and ensures that general education staff, including paraprofessionals, receive information and training about IEPs. There is strong evidence of inclusion and coordination between general and special education staff.

Operations Indicator Area 2.3 Management Accountability: Does the board hold management accountable for clear and measurable outcomes?

- Interviews with the school leader and teacher board members indicated that the school leader evaluation process was implemented this year. The primary data the board uses to evaluate school leader performance is feedback from staff surveys. While feedback from staff can be an important component of the school leader evaluation, the board itself is responsible for evaluating the school leader. The formal evaluation process must comply with MN Stat. §124E.07 Subd. 6 and should also evaluate performance in relation to OW contractual academic and environmental education goals. The board should establish a clear rubric that captures these required components to ensure shared and transparent understanding of the measures of success for the school leader.
- During the contract period, the board has made progress in understanding the difference between governance and management. It now works more clearly within its role of overseeing the school's progress. This year, when the board had some capacity challenges, the school leader stepped in to help by preparing monthly board packets and collecting materials for meetings. Although this support reflects the school's collaborative nature and is not prohibited, the board should work toward resuming responsibility for these tasks. Doing so will help keep a clear line between the board's role and school management, and support the board's continued growth in this area.

Thank you again for hosting Osprey Wilds' site visit. At our next site visit we are interested in learning more about students' academic progress as a result of their participation in academic interventions. Please let me know what questions you have about this feedback. We appreciate the work your team is doing to serve students and families in Monticello and at Swan River Montessori.

Sincerely,



Emily Edstrom Moore  
Authorizing Specialist, Academics  
Osprey Wilds, Charter School Division

cc: Annette Vemuri, School Director  
Addie Mazza, Authorizing Specialist

## Osprey Wilds – Charter School Board Meeting Observation Form

<b>School Name:</b> Swan River Montessori	<b>Scheduled Start Time:</b> 2:30
<b>Date of Board Meeting:</b> 4/15/2025	<b>Actual Start Time:</b> 2:37
<b>Type of Meeting (Regular, Special, Emergency):</b> Regular	<b>End Time:</b> 3:57
<b>Observation by:</b> Emily Edstrom Moore	
<b>Board member attendance:</b> 7 of 7 = 100%	<b>Ex-Officio Members present:</b> Annette Vemuri, Executive Director
<b>Others in attendance:</b> Craig Kepler	

A "YES" or "NO" below indicates whether or not the following were evident at the board meeting. Evaluation framework indicator areas are identified in the left column.

O = Operations Performance Framework; F = Financial Performance Framework.

<b>Key Contractual Performance Areas</b>		<b>YES/NO</b>	<b>Notes</b>
<b>O.2.2</b>	Board reviews and discusses academic performance related to charter contract goals (Exhibit G). <i>OW expects boards will monitor progress toward its contractual academic goals at least four times / year.</i>	N	Standing item on the agenda, though not a topic of discussion at this meeting.
<b>O.2.2</b>	Board reviews and discusses environmental education performance related to charter contract goals (Exhibit H) / Environmental Literacy Plan (ELP). <i>OW expects boards will monitor progress toward its contractual environmental education goals at least four times / year.</i>	N	Standing item on the agenda, though not a topic of discussion at this meeting.
<b>F.1.1</b>	Board reviews and discusses the school's financial performance for the current school year, including current enrollment in relation to budgeted enrollment.	Y	Budgeted/Actual Enrollment: 163/166 March financials reviewed, everything is on track. ADM is slightly ahead of the working budget. Fund balance projected by the end of June to be about \$750,000, or 40% of expenses.
<b>F.1.1</b>	Monthly financial statements include, at a minimum, the following reports: budgeted and actual revenue and expenses by year-to-date percentages, disbursements and deposits, and student enrollment report with enrollment expressed in terms of funding mechanisms (e.g. Pupil Units). <i>In accordance with Section 6.9(a) of the charter contract.</i>	Y	All of the required items are present in the financial materials.

<b>F.1.1</b>	Board reviews and approves expenditures (e.g. check registers and disbursements) in accordance with statute. <i>MN Stat. §13D.01 subd. 4(b) requires, "The vote of each member must be recorded on each appropriation of money, except for payments of judgments, claims, and amounts fixed by statute."</i>	Y	The board chair asked a few targeted questions related to the check register, including a potential typo related to Centerpoint Energy charges. The board discussed these items and then approved the disbursements.
<b>O.2.1</b>	Board training & development happens at the meeting or meaningful discussion / reflection occurs related to recent training attended by one or more board members. <i>OW expects boards will participate in or discuss training at least four times / year.</i>	N	Board training was not a topic of discussion at this meeting.
<b>O.2.2</b>	The meeting complies with MN Stat. §13D, Open Meeting Law. (See details below.)	Y	See notes below.
<b>Compliance Elements - Evident at Each Meeting</b>		<b>YES/NO</b>	<b>Notes</b>
<b>O.2.2</b>	MN Stat. §13D, Open Meeting Law Requirements:		
<b>O.2.2</b>	Meeting time, date, and place (or access information, if virtual) is posted properly on school website and/or onsite at school. <i>MN Stat. §13D.04</i>	Y	The meeting time, date, and place are posted on the website.
<b>O.2.2</b>	If meeting includes board member participation via interactive technology (e.g. Zoom), it is done so consistent with MN §13D. Agenda appropriately notes participation via interactive technology, including the location of the individual(s), and all board members and members of the public can see and hear one another during the meeting. <i>MN Stat. §13D.02</i>	N/A	
<b>O.2.2</b>	A quorum is present when a the board meeting is convened and / or any item on the agenda is being considered. <i>MN Stat. §317A.235</i>	Y	A quorum was present at the start of the meeting and maintained throughout.
<b>O.2.2</b>	One set of board materials is available for public inspection. <i>MN Stat. §13D.01 subd. 6</i>	Y	A copy of the meeting materials was present at the meeting for public inspection.
<b>O.2.2</b>	If closed, meeting is closed in accordance with MN §13D. Agenda notices statutory authority to close the meeting, board moves to close the meeting appropriately, board does not vote in closed session. <i>MN Stat. §13D.05</i>	N/A	
<b>O.2.2</b>	Actions taken by board, including any amendments, are clearly articulated.	Y	Actions up for consideration by the board were stated clearly.



<b>O.2.2</b>	Result of the vote is articulated by the board chair, including number of votes for and against if other than unanimous.	Y	The results of all votes were stated by the Chair after voting was completed.
<b>O.2.3</b>	Board engages in review of school leader performance throughout the school year. <i>OW expects boards will engage in school leader evaluation activities at least four times / year.</i>	N	School leader performance was not a topic of discussion at this meeting. Though, on the site visit today it was clear that the school leader evaluation process had just recently wrapped up for the year.
<b>O.2.2</b>	Board reviews and discusses the Outstanding Obligations from the Previous Contract (Exhibit S). <i>OW expects boards will monitor progress on resolving outstanding obligations from the previous contract at least four times / year.</i>	N	Exhibit S was not a topic of discussion at this meeting. It should be noted, however, that the only items included in Exhibit S are related to the academic goals.
<b>O.2.2</b>	Meeting follows approved agenda. <i>If not, provide detail.</i>	N	The agenda was followed completely, with one exception. The school's lawyer joined the meeting, to provide an update on a couple of issues. This was impromptu, as the most pressing issue came up within the last day. This item was not on the agenda as it was not clear if the lawyer was going to be available to join the meeting and, if so, when. The schools could consider in the future making a motion to amend the agenda to add the unexpected item.
<b>O.2.2</b>	Board meeting packet includes all materials relevant to the meeting agenda. <i>Note any that were missing as appropriate.</i>	Y	
<b>O.2.2</b>	Meeting minutes from any previous meetings include, at a minimum, the following information: <ul style="list-style-type: none"> <li>• Board member attendance</li> <li>• Actions taken by the board, including specifics on any amendments</li> <li>• Who made a motion and second</li> <li>• The result of the vote, including number of votes for and against if other than unanimous</li> </ul> <i>Indicate if any information is missing.</i>	Y	All of the required items are present in the minutes.
<b>O.2.1</b>	Board composition complies with applicable law and school bylaws, including ex-officio (non-voting) members. <i>MN Stat. §124E.07 subd. 3(a)</i>	Y	The board composition complies with applicable law as it has at least 5 members and at least one teacher, one community member, and one parent member as part of the current membership.
<b>O.2.2</b>	Charter School Website Requirements:		

O.6.3	Directory information for members of the board of directors including affiliation (e.g. parent, teacher, community member) and contact information (at least email address). <i>MN Stat. §124E.07, subd. 8(b)</i>	Y	All board member information is posted, and is up to date.
O.6.3	Minutes of meetings of the board of directors for at least one calendar year. <i>MN Stat. §124E.07, subd. 8(b)</i>	Y	Minutes are posted back through June 2021 and up to March 2025. The current board packet and agenda are also posted online and easily accessible. There are also archived minutes available going back several years.
O.6.3	Identifying and contact information for the school's authorizer. <i>MN Stat. §124E.07, subd. 8(b)</i>	Y	<a href="https://swanrivermontessori.org/about-us/about-srmcs/">https://swanrivermontessori.org/about-us/about-srmcs/</a>
O.6.3	Committee meeting time, place, and access information posted properly. <i>MN Stat. §13D.04</i>	Y	There are no standing committees of the board, though the two recent ad hoc committees have the access information and associated minutes posted properly.
<b><u>General Comments/Observations/Compliance Elements or Effective Practices Observed (e.g. Director Evaluation, Strategic Planning, Bylaws Changes, Policy Actions, etc.)</u></b>			
<b><u>Required Follow-Up:</u></b>			
None, thank you!			

# **Osprey Wilds Environmental Learning Center**

## **Operations and Financial Performance Evaluation Frameworks**

### **Governance-Specific Items**

In 2024, Osprey Wilds Environmental Learning Center (Osprey Wilds or OW) made updates to its Operations and Financial Performance Evaluation Frameworks in order to be more clear and transparent around requirements, expectations, and guidance related to board governance. Governance specific areas are outlined below. One key change is that items are designated as "Compliance Requirements" or "Effective Practices."

- To earn a rating of "Meets Standard," a school must comply with all compliance requirements for a given measure.
- "Effective Practices" will be noted on the evaluation.

The effective practices outlined for each measure reflect what Osprey Wilds considers to be effective practices based on the hundreds of board meetings OW staff and evaluators have collectively observed and reviewed over the past several years.

Evaluations will be completed annually based on board meeting observations, reviews of board meeting packets and minutes, and interviews with board members and school leaders.

#### **Operations Performance Evaluation**

- **2.1 Board Composition and Capacity**

##### **Compliance Requirements:**

- ☐ Board complies with applicable laws and its own bylaws with respect to board composition, including ex-officio (non-voting) members.
- ☐ Board conducts required background checks on all board members prior to being seated in accordance with Section 6.20 of the charter contract.
- ☐ Board members complete statutorily mandated initial and annual training.
- ☐ Board conducts an annual assessment of the training needs of individual members and the full board as required by statute.
- ☐ Board conducts an annual assessment of the board's performance.
- ☐ Board elections are consistent with statute and bylaws.
- ☐ Officer elections are consistent with statute and bylaws.

##### **Effective Practices:**

- ☐ The board develops and implements a plan to provide new board members with information and support that adequately prepares them to be effective.
- ☐ The board develops, implements, and evaluates a board training and development plan.

- ☐ The board specifies the duties of its officers either in its bylaws or in board policy.
- ☐ The board actively makes information available about board service opportunities to staff, parents and members of the community.
- ☐ Board meeting attendance exceeds 80%.

• **2.2 Board Decision-Making and Oversight**

**Compliance Requirements:**

- ☐ Board meeting minutes are complete and include, at a minimum, the following:
  - Board member attendance;
  - Actions taken by the board, including specifics on any amendments;
  - Who made a motion and second; and
  - The result of the vote, including number of votes for and against if other than unanimous.
- ☐ Meetings are held consistent with Open Meeting Law
  - Meeting times and location are posted properly on the school website and/or onsite at the school, including for special or emergency meetings.
  - If meeting includes board member participation via interactive technology (e.g. Zoom), it is done so consistent with MN Stat. §13D.
  - A quorum is present when the board meeting is convened.
  - One set of board materials is available for public inspection.
  - If meeting is closed, it is done so in accordance with MN Stat. 13D: agenda and minutes show statutory authority to close the meeting and minutes appropriately summarize actions taken during the closed meeting.
- ☐ The board reviews the school's performance related to its contractual academic and academic-related goals (Exhibit G) at least four times per year.
- ☐ The board reviews the school's performance related to its contractual environmental education goals (Exhibit H) and environmental literacy plan at least four times per year.
- ☐ The board monitors the school's financial management, short-term financial sustainability, and long-term financial viability at each meeting.
- ☐ The board reviews the school's performance related to its Outstanding Obligations from the Previous Contract in Exhibit S of the charter contract at least four times per year (if applicable).
- ☐ The board takes appropriate action to ensure the school's success based on its review of school performance.
- ☐ Required policies are in place and policies that must be approved or reviewed annually are addressed.

- ☐ Articles of Incorporation (Exhibit B) are compliant with statute and the charter contract.
- ☐ Bylaws (Exhibit C) are compliant with statute and the charter contract.
- ☐ The board reviews and approves or accepts key organizational documents (e.g. Annual Report, Financial Audit, Contract with Authorizer, and other Authorizer related documents).
- ☐ The board ensures that the school's affiliated building company complies with all applicable legal requirements (if applicable).
- ☐ The board ensures that the school's charter management organization (CMO) or education management organization (EMO) complies with all applicable legal requirements and contractual obligations (if applicable).

**Effective Practices:**

- ☐ Meeting minutes include or provide:
  - Start and end time of meeting; and
  - A clear understanding of what happened at the meeting.
- ☐ The board packet includes all materials relevant to meeting agenda.
- ☐ Board meetings are conducted with a quorum present at all times.
- ☐ The board has a policy review cycle in place, including bylaws, that is implemented with fidelity.
- ☐ The board engages in strategic planning and monitors implementation.
- ☐ Board packets are sent to board members at least five days in advance of the board meeting.
- ☐ The board develops, updates, and follows an annual governance calendar.
- ☐ The board uses committees to support effective governance.

• **2.3 School Leader Management and Accountability**

**Compliance Requirements:**

- ☐ Board establishes qualifications for all persons who hold administrative, academic supervision, or instructional leadership roles in accordance with MN Stat. §124E.12 Subd. 2(a).
- ☐ Board establishes a formal performance evaluation process for the school leader or EMO/CMO in accordance with MN Stat. §124E.07 Subd. 6.
- ☐ Board implements a formal performance evaluation process for the school leader or EMO/CMO in accordance with MN Stat. §124E.12 Subd. 2(a).
- ☐ School leaders who do not hold a valid administrative license annually develop, implement, and report on a professional development plan approved by the charter

- school board of directors in accordance with MN Stat. §124E.12 Subd. 2(b) (if applicable).
- ☐ School leaders who do not hold a valid administrative license annually complete a minimum of 25 hours of competency-based training corresponding to the professional development plan approved by the charter school board of directors in accordance with MN Stat. §124E.12 Subd. 2(b) (if applicable).
  - ☐ School leader performance evaluation process evaluates performance in relation to OW contractual academic and environmental education goals and expectations.
  - ☐ Board engages in periodic school leadership evaluation activities throughout the school year (at least four times per year) as documented by board meeting minutes.

**Effective Practices:**

- ☐ The board collaborates with school leadership to set annual professional goals for the leader.
- ☐ The board develops and implements a policy for annual director evaluation and a timeline for related activities.
- ☐ The board ensures transparency and accountability to staff, families and community. For example, the school communicates with families, staff and community regarding school performance in a concise and comprehensible manner; the board engages with families and is open to feedback and input.

**Financial Performance Evaluation**

- **1.1 Budgeting**

**Compliance Requirements:**

- ☐ Board meeting minutes and/or audit notes document approval of fiscal year budget on or prior to the June 30 statutory deadline (MN Stat. §123B.77 Subd. 4).
- ☐ The board approves mid-year budget updates as necessary.
- ☐ At least monthly, the board reviews and approves quality financial statements in accordance with Section 6.9(a) of the charter contract, which include the following reports: budgeted and actual revenue and expenses by year-to-date percentages, disbursements and deposits, and student enrollment report with enrollment expressed in terms of funding mechanisms (e.g. Pupil Units).
- ☐ At least quarterly (for quarters ending 9/30, 12/31, 3/31, and 6/30), the board reviews and approves quality financial statements in accordance with Section 6.9(a) of the charter contract, which include the following reports: a balance sheet, income statement that includes revenues and expenses by UFARS programs (in accordance with Exhibit R of the contract), up-to-date cash flow projections, and fiscal year-end fund balance projections.

☐ Revenue and expenditure budget variances are within 5% of the February 1 approved budget.

- The variance compares actuals to projected revenues and expenditures based on the school's approved budget as of February 1\* for all fund areas.

**Effective Practices:**

☐ The board engages in long-range financial planning (e.g. 3-year financial projection/planning).

- **1.2 Enrollment Variance**

**Compliance Requirements:**

☐ The school accurately projects enrollment (within 5%).

- **1.3 Financial Policies and Practices**

**Compliance Requirements:**

☐ The school has in place required financial policies, including the following:

- Procurement Policy (MN Stat. §124E.26)
- Fund Balance Policy (OW Contract, Exhibit P)
- Credit Card Policy (OW Contract, Exhibit P)
- Conflict of Interest Policy (MN Stat. §124E.14)
- Electronic Funds Transfer Policy (MN Stat. §471.38)
- Contributions and Fundraising Policy (OW Contract Section 6.13)
- Group Health Insurance Policy (required if the school provides group health insurance coverage) (MN Stat. §124E.12, Subd. 5(b))
- Assessing Student Fees Policy (required if the school charges fees for textbooks, workbooks, and library books) (MN Stat. §123B.37)
- School Meals Policy (required if the school participates in the National School Lunch Program) (MN Stat. §124D.111 Subd. 1(a))

☐ The school has no audit findings related to appropriate use of public funds.

☐ The school has sufficient internal controls to prevent fraud, waste, and abuse.

- **1.5 Financial Audit**

**Compliance Requirements:**

☐ The most recent financial audit includes no significant deficiencies or material weaknesses.

- ☐ The most recent financial audit included an unqualified/unmodified opinion.
- ☐ Any previous year audit findings have not been repeated in most recent audit.
- ☐ Appropriate corrective action plan is in place to ensure any finding is not repeated in the next fiscal year.
- ☐ The audit report did not include a going concern disclosure in the notes or an explanatory paragraph within the audit report.