

SWAN RIVER MONTESSORI CHARTER SCHOOL

School Board Meeting

Monday, September 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 __ @__ 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-

V. DECLARATION OF CONFLICTS-

VI. FINANCIAL REPORT

The following was discussed during the SRMCS School Board Finance Committee Meeting:

August Financial Report - Fiscal Year 2026 (FY26)

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:

- \$841,225 Cash balance at end of the month
- \$112,491 State receivables which represents an initial estimate for the beginning of the accrual for the current year hold back
- \$154,269 State receivables which represents the remaining amount due to the school from the state 10% holdback of the prior school year
- (\$4,337) Salary and benefits payables estimated. This is for summer salaries as of month-end.

Income Statement:

- Adopted Budget: 165 ADM

- Working Budget: 165 ADM
- Actual ADM 165 in August
- 17% Percent of the fiscal year completed
- 15% YTD revenue as a percent of budget based on the working budget.
- 5% YTD expenses as a percent of budget based on the working budget.
- \$979,492 Projected year end fund balance
- 39% Projected ending fund balance as a % of expense budget

FY25 Enrollment Numbers as of 9.12.25

- i. Charter School (K-6) = 170
- ii. Children's House (EC) = 11
- iii. Pupil Unit Actual/Budget = 170/165

SRMCS continues to be in good financial standing. Not much activity due to it being August and FY26 was just getting started. The budget will be revised at a later date to reflect increased enrollment and changes to salaries/payroll.

- a. Motion to approve August financials made by ____, Seconded by _____. Board Vote-
- b. Review of Bills-
- c. Donations-

VII. CONSENT AGENDA - Motion to approve consent agenda made by ____, Seconded by _____. Board Vote-
a. August Minutes

VIII. ENVIRONMENTAL EDUCATION REPORT AS RELATED TO CONTRACTED GOALS-

IX. ACADEMIC PERFORMANCE REPORT AS RELATED TO CONTRACTED GOALS –

X. DIRECTOR GOALS-

XI. STRATEGIC PLANNING & GOAL SETTING- -

XII. OLD BUSINESS

XIII. NEW BUSINESS

- a. Osprey Wilds Authorizer Renewal Application
- b. Wellness Policy- recommended policy to be shared at meeting by committee
- c. Board Member Statements of Assurance & Oath of Office documents

XIV. REVIEW OF NEXT MEETING AGENDA

- a. Date, Time & Location of next Board Meeting: Tuesday, October 14, 2025 at 2:30 PM

Upcoming Agenda Items- FY26

Old Business

Crisis Management Policy

New Business

Whistleblowers Policy
Financial & Cash Management Policy
Religious Expressions Policy
Credit Card Policy
Equal Educational Opportunity Policy
Purchasing Policy
Compensation for Substitutes Policy
Internet Acceptable Use & Safety Policy
Application & Enrollment Procedures Policy
Background Checks Policy
Intellectual Property Policy
Meal Charge and Serving Procedures Policy
Pledge of Allegiance Policy

XV. MOTION TO ADJOURN by ____ at ____ PM, Seconded by ____ . Board Vote-



Swan River Montessori Monthly Financials

AUGUST 2025

EdFinMN

FINANCE AND ACCOUNTING SERVICES FOR CHARTER
SCHOOL AND EDUCATION SUPPORT ORGANIZATIONS

Swan River Montessori Financial Highlights

AUGUST 2025

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:

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- (\$4,337) Salary and benefits payables estimated. This is for summer salaries as of month-end.

Income Statement

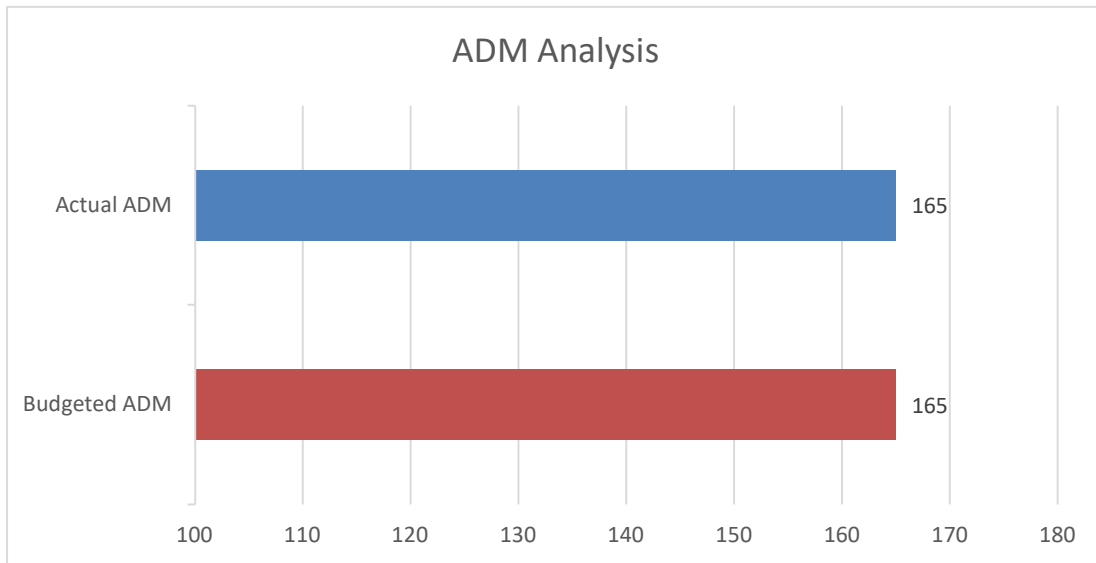
The focus of the school's income statement is to monitor the ongoing revenues and expenses of the various programs. A monthly review of the actual spent vs. budget as well as taking into consideration the percentage of the fiscal year completed is imperative. Yet, also understanding how each individual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

- Adopted Budget: 165 ADM
- Working Budget: 165 ADM
- Actual ADM 165
- 17% Percent of the fiscal year completed
- 15% YTD revenue as a percent of budget based on the working budget.
- 5% YTD expenses as a percent of budget based on the working budget.
- \$979,492 Projected year end fund balance
- 39% Projected ending fund balance as a % of expense budget

Cash Flow:

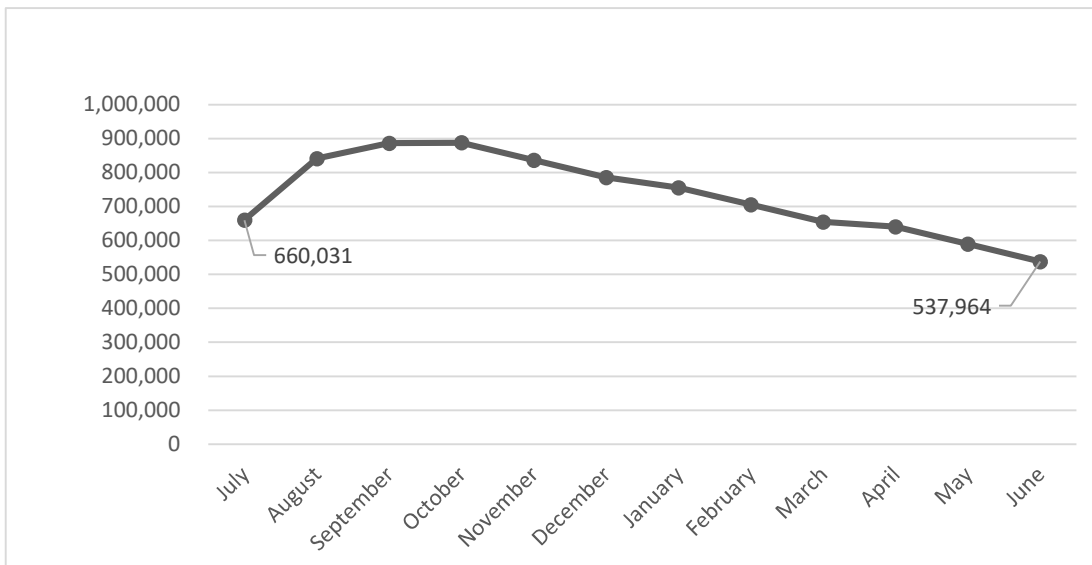
- Estimated cash balance as of June 30, 2026
\$ 537,964

Enrollment/ADM's



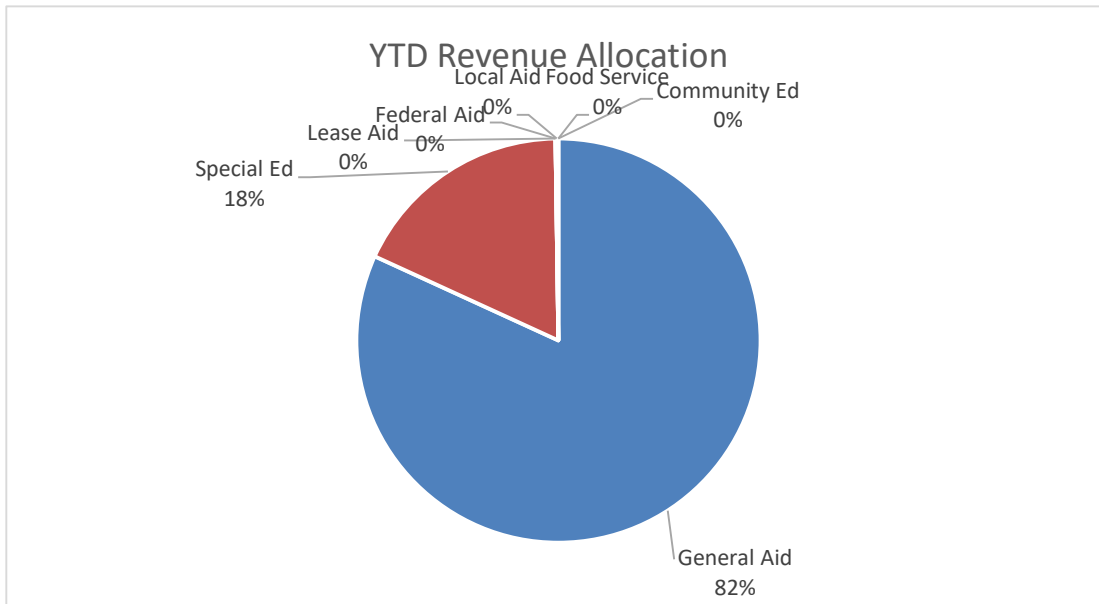
Monitoring the school's budgeted ADM vs. the actual ADM is one of the most important analytical revenue reviews. Variance from the budgeted ADM must be reviewed and understood.

Cash Flow Projection



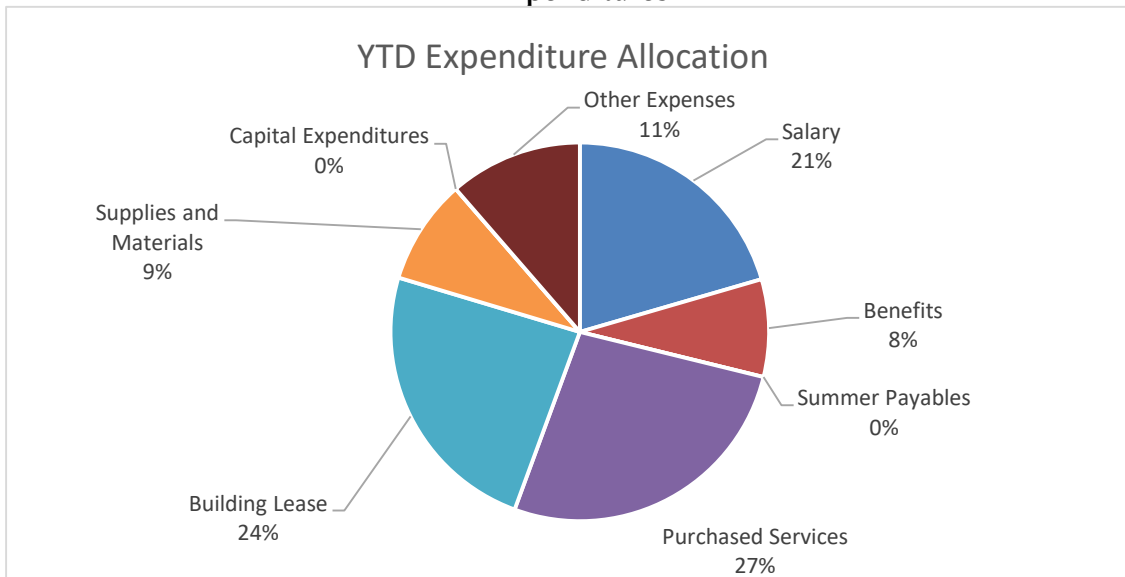
Swan River's cash balance is expected to increase slightly during fiscal 2026.

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 August 31, 2025

Assets		As of Month-End	
Cash			841,225
MDE Receivable - Current year estimate			112,491
MDE Receivable - Prior year			154,269
Federal Receivable			(573)
Total Assets	\$		1,107,413
Liabilities			
Salary and Benefits Payable	\$		(4,337)
Total Liabilities	\$		(4,337)
Fund Balance			
Beginning - Unaudited	\$		852,976
Change in Fund Balance			258,774
Ending- Projected	\$		1,111,750
Total Liabilities and Fund Balance	\$		1,107,413

Current year based on estimated, primarily for ADM numbers.

Swan River Montessori Charter School
Income Statement Summary
As of August 31, 2025

Revenue	Adopted Budget - 165 ADM	Working Forecast - 165 ADM	Monthly Activity	Year to Date	% of Budget
State Aids	\$ 2,402,172	\$ 2,402,172	\$ 141,728	\$ 395,424	16.5%
Federal Aids	133,246	133,246	-	-	0.0%
Local	103,725	103,725	473	990	1.0%
Total	\$ 2,652,884	\$ 2,652,884	\$ 142,201	\$ 396,414	14.9%
Expense					
Salary	\$ 1,176,531	\$ 1,176,531	\$ 19,908	\$ 28,227	2.4%
Benefits	295,437	295,437	3,758	11,481	3.9%
Summer Payables	-	-	-	-	NA
Purchased Services	619,905	619,905	22,928	36,842	5.9%
Supplies and Materials	223,023	223,023	9,361	12,343	5.5%
Capital Expenditures	174,578	174,578	16,532	33,063	18.9%
Other Expenses	36,894	36,894	9,518	15,684	42.5%
Total	\$ 2,526,368	\$ 2,526,368	\$ 82,005	\$ 137,640	5.4%
Change in Fund Balance	\$ 126,516	\$ 126,516	\$ 60,196	\$ 258,774	
Beginning Fund Balance	852,976	852,976	852,976	852,976	
Ending- Projected	\$ 979,492	\$ 979,492	\$ 913,172	\$ 1,111,750	
FB as a % of Exp					
	39%	39%			

	Beginning Fund Balance 7/1/2025 - Unaudited	Projected Revenues	Projected Expenditures	Projected Fund Balance 6/30/2026	Profit (Loss) CY
Fund					
General Fund 1	\$ 782,025	2,395,348	2,283,940	893,433	111,408
Food Service Fund 2	-	131,911	131,911	-	-
Community Service Fund 4	70,951	125,625	110,517	86,059	15,108
Total	\$ 852,976	\$ 2,652,884	\$ 2,526,368	\$ 979,492	\$ 126,516

Swan River Montessori Charter School
Detail Revenue
As of August 31, 2025

17% Year Complete

	Adopted Budget - 165 ADM	Working Forecast - 165 ADM	Monthly Activity	Year to Date	% of Budget
General Fund					
State Aid					
General Aid	\$ 1,292,881	\$ 1,292,881	\$ 70,687	\$ 211,891	16%
Special Ed	731,483	731,483	71,041	71,041	10%
Compensatory	49,171	49,171	-	-	0%
Lease Aid	157,120	157,120	-	-	0%
Literacy Incentive Aid	17,793	17,793	-	-	0.0%
Hourly Worker Unemployment	37,574	37,574	-	-	0.0%
School Library Aid	20,000	20,000	-	-	0.0%
Student Support Aid	20,000	20,000	-	-	0.0%
State Aid Receivables*	-	-	-	112,491	N/A
Total State Aid	\$ 2,326,022	\$ 2,326,022	\$ 141,728	\$ 395,424	17%
Federal Aid					
Title I	\$ 24,114	\$ 24,114	\$ -	\$ -	0%
Special Ed	26,312	26,312	-	-	0%
Total Federal Aid	\$ 50,426	\$ 50,426	\$ -	\$ -	0%
Local Aid and Donation					
Interest	\$ 500	\$ 500	\$ 473	\$ 990	198%
Miscellaneous	400	400	-	-	0.0%
Donations and Other	10,000	10,000	-	-	0%
Fees for Services	8,000	8,000	-	-	0%
Total Local and Donation	\$ 18,900	\$ 18,900	\$ 473	\$ 990	5%
Total General Fund Revenue	\$ 2,395,348	\$ 2,395,348	\$ 142,201	\$ 396,414	17%
Food Service Fund					
State Revenue	\$ 35,350	\$ 35,350	\$ -	\$ -	0%
Federal Revenue	82,820	82,820	-	-	0%
Transfer from General	13,741	13,741	-	-	0%
Total Food Service Revenue	\$ 131,911	\$ 131,911	\$ -	\$ -	0%
Community Service Fund					
Before/After School Care	\$ 40,800	\$ 40,800	\$ -	\$ -	0%
Children's House Tuition	84,825	84,825	-	-	0%
Total Community Service Revenue	\$ 125,625	\$ 125,625	\$ -	\$ -	0%
Total Revenue- All Funds	\$ 2,652,884	\$ 2,652,884	\$ 142,201	\$ 396,414	15%

Swan River Montessori Charter School
Detail Expense
As of August 31, 2025

FYTD: 17%

	Adopted Budget - 165 ADM	Working Forecast - 165 ADM	Monthly Activity	Year to Date	% of Budget
Admin and Operations					
100 Salaries	\$ 119,397	\$ 119,397	\$ 10,014	\$ 15,020	13%
200 Benefits	36,587	36,587	1,901	9,189	25%
305 Contracted Services	158,500	158,500	8,561	15,402	10%
320 Communication	5,971	5,971	490	490	8%
329 Postage	896	896	-	-	0%
330 Utilities	39,182	39,182	2,607	4,725	12%
340 Insurance	25,632	25,632	-	-	0%
350 Repairs & Maintenance	2,081	2,081	-	-	0%
366 Conferences/Professional Development	5,202	5,202	-	-	0%
401 General Supplies	23,881	23,881	237	612	3%
405 Purchased Software (405/406)	520	520	2,870	4,048	778%
490 Food	416	416	-	-	0%
570 Building Lease	174,578	174,578	16,532	33,063	19%
820 Dues & Memberships	21,995	21,995	9,505	13,826	63%
899 Misc Expenses - Missing Support	-	-	-	1,845	0%
910 Transfers to Other Funds	13,741	13,741	-	-	0%
Total Admin and Operations	\$ 628,579	\$ 628,579	\$ 52,716	\$ 98,220	16%
Instructional Support and Services					
100 Salaries	\$ 575,809	\$ 575,809	\$ 1,140	\$ 1,319	0%
200 Benefits	153,691	153,691	613	640	0%
360 Transportation - Field Trips	13,183	13,183	-	-	0%
366 Conferences/Professional Development	6,615	6,615	250	307	5%
401 General Supplies	14,646	14,646	4,206	4,206	29%
405 Purchased Software (405/406)	-	-	-	1,429	0%
430 Instructional Supplies	31,244	31,244	798	798	3%
461 Standardized Tests	2,756	2,756	-	-	0%
820 Dues & Memberships	1,158	1,158	13	13	1%
Total Instructional Support and Services	\$ 799,102	\$ 799,102	\$ 7,020	\$ 8,712	1%

Swan River Montessori Charter School
Detail Expense
As of August 31, 2025

FYTD: 17%

	Adopted Budget - 165 ADM	Working Forecast - 165 ADM	Monthly Activity	Year to Date	% of Budget
Special Education					
100 Salaries	\$ 377,118	\$ 377,118	\$ 7,338	\$ 9,763	3%
200 Benefits	100,657	100,657	1,244	1,652	2%
305 Contracted Services	7,525	7,525	4,293	9,056	120%
360 Transportation - SPED & HHM	-	-	3,867	3,867	0%
366 Conferences/Professional Development	1,186	1,186	-	-	0%
394 Payments to Other Agencies	332,487	332,487	2,578	2,578	1%
401 General Supplies	4,829	4,829	-	-	0%
405 Purchased Software	1,984	1,984	-	-	0%
430 Instructional Supplies	-	-	1,250	1,250	0%
433 Instructional Supplies- Ind	9,104	9,104	-	-	0%
Total Special Education	\$ 834,890	\$ 834,890	\$ 20,569	\$ 28,164	3%
Title Programs					
100 Salaries	16,867	16,867	-	-	0%
200 Benefits	4,502	4,502	-	-	0%
Total Title Programs	21,369	21,369	-	-	0%
Total General Fund Expenditures	\$ 2,283,940	\$ 2,283,940	\$ 80,305	\$ 135,096	6%
Food Service Fund					
490 Food	131,911	131,911	-	-	0%
Total Food Service	\$ 131,911	\$ 131,911	\$ -	\$ -	0%
Community Ed Fund					
100 Salaries	\$ 87,340	\$ 87,340	\$ 1,417	\$ 2,126	2%
200 Benefits	21,202	21,202	282	418	2%
394 Field Trips	243	243	-	-	0%
401 General Supplies	1,489	1,489	-	-	0%
820 Dues & Memberships	243	243	-	-	0%
Total Community Ed	110,517	110,517	1,699	2,543	2%
Total Expense- All Funds	\$ 2,526,368	\$ 2,526,368	\$ 82,005	\$ 137,640	5%

Swan River Montessori Charter School
CashFlow Summary
As of August 31, 2025

10 Months Remaining

Cash Receipts	Budget	Monthly Activity	Year to Date	September	October	November	December	January	February	March	April	May	June	Total
State Aids- Current Year	\$ 2,326,022	\$ 141,728	\$ 282,932	\$ 141,382	\$ 141,382	\$ 141,382	\$ 141,382	\$ 141,382	\$ 141,382	\$ 141,382	\$ 141,382	\$ 141,382	\$ 141,382	\$ 1,696,752
State Aids- Prior Year	154,269	-	-	96,122	40,835	-	-	8,524	1,854	-	24,636	-	-	171,971
Federal - Current Year	50,426	-	-	-	12,607	-	-	12,607	-	-	12,607	-	-	37,820
Local	144,525	473	990	13,092	13,092	13,092	13,092	13,092	13,092	13,092	13,092	13,092	13,092	131,911
Food Service	131,911	-	-	12,532	12,532	12,532	12,532	12,532	12,532	12,532	12,532	12,532	12,532	125,315
Total Inflows	\$ 2,806,580	\$ 142,201	\$ 283,922	\$ 263,128	\$ 220,447	\$ 167,006	\$ 167,006	\$ 188,136	\$ 168,860	\$ 167,006	\$ 204,248	\$ 167,006	\$ 167,006	\$ 2,163,769
Expense														
Salary	\$ 1,176,531	\$ 19,908	\$ 28,227	\$ 98,044	\$ 98,044	\$ 98,044	\$ 98,044	\$ 98,044	\$ 98,044	\$ 98,044	\$ 98,044	\$ 98,044	\$ 98,044	\$ 1,008,670
Benefits	295,437	3,758	11,481	24,620	24,620	24,620	24,620	24,620	24,620	24,620	24,620	24,620	24,620	257,679
Purchased Services	619,905	22,928	36,842	58,306	58,306	58,306	58,306	58,306	58,306	58,306	58,306	58,306	58,306	619,905
Supplies and Materials	223,023	9,361	12,343	21,068	21,068	21,068	21,068	21,068	21,068	21,068	21,068	21,068	21,068	223,023
Capital Expenditures	174,578	16,532	33,063	14,152	14,152	14,152	14,152	14,152	14,152	14,152	14,152	14,152	14,152	174,578
Other Expenses	36,894	9,518	15,684	2,121	2,121	2,121	2,121	2,121	2,121	2,121	2,121	2,121	2,121	36,894
Accounts Payable	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Outflows	\$ 2,526,368	\$ 82,005	\$ 137,640	\$ 218,311	\$ 218,311	\$ 218,311	\$ 218,311	\$ 218,311	\$ 218,311	\$ 218,311	\$ 218,311	\$ 218,311	\$ 218,311	\$ 2,320,748
Change in Cash	\$ 44,817	\$ 2,136	\$ (51,305)	\$ (51,305)	\$ (30,175)	\$ (49,451)	\$ (51,305)	\$ (14,063)	\$ (51,305)	\$ (51,305)	\$ (156,979)			
Beginning	\$ 841,225	\$ 886,042	\$ 888,178	\$ 836,873	\$ 785,568	\$ 755,393	\$ 705,942	\$ 654,637	\$ 640,574	\$ 589,269				
Line of Credit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
Ending- Projected	\$ 886,042	\$ 888,178	\$ 836,873	\$ 785,568	\$ 755,393	\$ 705,942	\$ 654,637	\$ 640,574	\$ 589,269	\$ 537,964				

Swan River Montessori Charter School
CashFlow Summary
As of August 31, 2025

10 Months Remaining

Cash Receipts	Budget	Monthly Activity	Year to Date	Budget	Remaining
State Aids- Current Year	\$ 2,326,022	\$ 141,728	\$ 282,932	\$ 2,326,022	\$ 629,270
State Aids- Prior Year	154,269	-	-	154,269	-
Federal - Current Year	50,426	-	-	50,426	12,607
Local	144,525	473	990	144,525	-
Food Service	131,911	-	-	131,911	6,596
Total Inflows	\$ 2,806,580	\$ 142,201	\$ 283,922	\$ 2,806,580	\$ 647,899

Expense					
Salary	\$ 1,176,531	\$ 19,908	\$ 28,227	\$ 1,176,531	\$ 167,861
Benefits	295,437	3,758	11,481	295,437	37,758
Purchased Services	619,905	22,928	36,842	619,905	-
Supplies and Materials	223,023	9,361	12,343	223,023	-
Capital Expenditures	174,578	16,532	33,063	174,578	-
Other Expenses	36,894	9,518	15,684	36,894	-
Accounts Payable	-	-	-	-	-
Total Outflows	\$ 2,526,368	\$ 82,005	\$ 137,640	\$ 2,526,368	\$ 205,619

Change in Cash

Beginning
Line of Credit
Ending- Projected

Days Cash on Hand
85

NOTES TO THE FINANCIAL STATEMENTS

AUGUST 2025

- 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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The logo for EdFin MN, featuring the text "EdFin" in white and "MN" in red on a black square background.

EdFin
MN

EdFinMN | 1400 Van Buren St. NE #200 | Minneapolis | MN | 55413
| www.edfinmn.org | info@edfinmn.org

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 06/01/25-06/30/25 500 Maple St		\$126.23
PO#:	Voucher #:	14284	Invoice	Invoice No: DT080125	8/6/2025	Paid Amt: \$126.23
		E 01 005 810 000 330		Water & Sewer 06/01/25-06/30/25 503 Maple St		\$92.12
PO#:	Voucher #:	14285	Invoice	Invoice No: DT080125	8/6/2025	Paid Amt: \$92.12
						Check Amount: \$218.35
SHBC	1566			IRS		Wire
		B 01 215 002		Federal Tax		\$2,367.62
PO#:	Voucher #:	14236	Invoice	Invoice No: S2026020	8/6/2025	Paid Amt: \$2,367.62
						Check Amount: \$2,367.62
SHBC	1567			MN Dept. Revenue		Wire
		B 01 215 003		State Tax		\$290.72
PO#:	Voucher #:	14233	Invoice	Invoice No: S2026020	8/6/2025	Paid Amt: \$290.72
						Check Amount: \$290.72
SHBC	1616			MedSurety		Wire
		E 01 005 110 000 305		HSA Fee		\$30.00
PO#:	Voucher #:	14286	Invoice	Invoice No: 43884	8/6/2025	Paid Amt: \$30.00
						Check Amount: \$30.00
SHBC	1001			PERA		Wire
		B 01 215 007		PERA		\$181.87
PO#:	Voucher #:	14239	Invoice	Invoice No: S2025242	8/8/2025	Paid Amt: \$181.87
						Check Amount: \$181.87
SHBC	1001			PERA		Wire
		B 01 215 007		PERA		\$480.41
PO#:	Voucher #:	14234	Invoice	Invoice No: S2026020	8/8/2025	Paid Amt: \$480.41
						Check Amount: \$480.41
SHBC	1002			TRA		Wire
		B 01 215 006		TRA		\$1,736.98
PO#:	Voucher #:	14235	Invoice	Invoice No: S2026020	8/8/2025	Paid Amt: \$1,736.98
						Check Amount: \$1,736.98
SHBC	1002			TRA		Wire
		B 01 215 006		TRA		\$5,155.80
PO#:	Voucher #:	14240	Invoice	Invoice No: S2025242	8/8/2025	Paid Amt: \$5,155.80
						Check Amount: \$5,155.80

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	1052			Centerpoint Energy		Wire	
		E 01 005 810 000 330		Gas Charges 500 Maple Street 07/09/25-08/09/25		\$66.37	
PO#:	Voucher #:	14288	Invoice	Invoice No: DT080825	8/8/2025	Paid Amt:	\$66.37
						Check Amount:	\$66.37
SHBC	1052			Centerpoint Energy		Wire	
		E 01 005 810 000 330		Gas Charges 503 Maple St. 07/10/25-08/10/25		\$18.23	
PO#:	Voucher #:	14287	Invoice	Invoice No: DT080825	8/8/2025	Paid Amt:	\$18.23
						Check Amount:	\$18.23
SHBC	1566			IRS		Wire	
		B 01 215 002		Federal Tax		\$6,079.45	
PO#:	Voucher #:	14241	Invoice	Invoice No: S2025242	8/8/2025	Paid Amt:	\$6,079.45
						Check Amount:	\$6,079.45
SHBC	1616			MedSurety		Wire	
		B 01 215 016		Payroll Deductions-Vision		\$241.67	
PO#:	Voucher #:	14232	Invoice	Invoice No: S2026020	8/8/2025	Paid Amt:	\$241.67
		B 01 215 016		Payroll Deductions-Vision		\$325.01	
PO#:	Voucher #:	14237	Invoice	Invoice No: S2025242	8/8/2025	Paid Amt:	\$325.01
						Check Amount:	\$566.68
SHBC	1001			PERA		Wire	
		B 01 215 007		PERA		\$379.18	
PO#:	Voucher #:	14276	Invoice	Invoice No: S2026030	8/22/2025	Paid Amt:	\$379.18
						Check Amount:	\$379.18
SHBC	1001			PERA		Wire	
		B 01 215 007		PERA		\$181.87	
PO#:	Voucher #:	14281	Invoice	Invoice No: S2025243	8/22/2025	Paid Amt:	\$181.87
						Check Amount:	\$181.87
SHBC	1002			TRA		Wire	
		B 01 215 006		TRA		\$715.12	
PO#:	Voucher #:	14277	Invoice	Invoice No: S2026030	8/22/2025	Paid Amt:	\$715.12
						Check Amount:	\$715.12
SHBC	1002			TRA		Wire	
		B 01 215 006		TRA		\$5,130.20	
PO#:	Voucher #:	14282	Invoice	Invoice No: S2025243	8/22/2025	Paid Amt:	\$5,130.20
						Check Amount:	\$5,130.20

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	1054			Xcel Energy		Wire	
		E 01 005 810 000 330		Electric Charges 05/06/25-06/04/25			\$1,691.22
PO#:	Voucher #:	14291 Invoice	Invoice No:	93595509	8/22/2025	Paid Amt:	\$1,691.22
						Check Amount:	\$1,691.22
SHBC	1109			MACS (MN Ass of Charter Schls)		Wire	
		E 01 005 110 000 820		MACS-August			\$246.87
PO#:	Voucher #:	14289 Invoice	Invoice No:	DT081125	8/22/2025	Paid Amt:	\$246.87
						Check Amount:	\$246.87
SHBC	1184			US Bank - Credit Card		Wire	
		E 01 005 110 000 405		Office Software			\$52.05
		E 01 010 203 000 401		Classroom Supplies			\$4,098.47
PO#:	Voucher #:	14290 Invoice	Invoice No:	DT081125	8/22/2025	Paid Amt:	\$4,150.52
						Check Amount:	\$4,150.52
SHBC	1566			IRS		Wire	
		B 01 215 002		Federal Tax			\$1,163.51
PO#:	Voucher #:	14278 Invoice	Invoice No:	S2026030	8/22/2025	Paid Amt:	\$1,163.51
						Check Amount:	\$1,163.51
SHBC	1566			IRS		Wire	
		B 01 215 002		Federal Tax			\$6,044.19
PO#:	Voucher #:	14283 Invoice	Invoice No:	S2025243	8/22/2025	Paid Amt:	\$6,044.19
						Check Amount:	\$6,044.19
SHBC	1567			MN Dept. Revenue		Wire	
		B 01 215 003		State Tax			\$941.17
PO#:	Voucher #:	14238 Invoice	Invoice No:	S2025242	8/22/2025	Paid Amt:	\$941.17
						Check Amount:	\$941.17
SHBC	1567			MN Dept. Revenue		Wire	
		B 01 215 003		State Tax			\$170.12
PO#:	Voucher #:	14275 Invoice	Invoice No:	S2026030	8/31/2025	Paid Amt:	\$170.12
						Check Amount:	\$170.12
SHBC	1567			MN Dept. Revenue		Wire	
		B 01 215 003		State Tax			\$934.08
PO#:	Voucher #:	14280 Invoice	Invoice No:	S2025243	8/31/2025	Paid Amt:	\$934.08
						Check Amount:	\$934.08
SHBC	1616			MedSurety		Wire	
		B 01 215 016		Payroll Deductions-Vision			\$325.01
PO#:	Voucher #:	14279 Invoice	Invoice No:	S2025243	8/31/2025	Paid Amt:	\$325.01

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	1616			MedSurety		Wire	
		B 01	215	016			\$241.67
PO#:	Voucher #:	14274	Invoice	Invoice No: S2026030	8/31/2025	Paid Amt: Check Amount:	\$241.67 \$566.68
SHBC	1644			Nelnet		Wire	
		E 01	005	110 000 000 305			\$30.00
PO#:	Voucher #:	14316	Invoice	Invoice No: DT080425	8/5/2025	Paid Amt: Check Amount:	\$30.00 \$30.00
SHBC	1050			SRCS Building Co		Wire	
		E 01	005	850 000 348 570			\$16,531.67
PO#:	Voucher #:	14317	Invoice	Invoice No: DT081325	8/13/2025	Paid Amt: Check Amount:	\$16,531.67 \$16,531.67
SHBC	1664			Elan Financial Services		Wire	
		E 01	005	110 000 000 320			\$490.02
		E 01	005	110 000 000 405			\$60.00
		E 01	010	203 000 000 220			\$440.39
		E 01	010	420 000 740 433			\$1,249.77
		E 01	010	203 000 000 820			\$12.93
PO#:	Voucher #:	14319	Invoice	Invoice No: DT081925	8/19/2025	Paid Amt: Check Amount:	\$2,253.11 \$2,253.11
SHBC	1530			Sherburne State Bank		Wire	
		E 01	005	110 000 000 305			\$35.00
PO#:	Voucher #:	14320	Invoice	Invoice No: DT083125	8/31/2025	Paid Amt: Check Amount:	\$35.00 \$35.00
SHBC	18618 1204			Adam's Pest Control, Inc.		Check	
		E 01	005	810 000 000 305			\$85.00
PO#:	Voucher #:	14246	Invoice	Invoice No: 4207034	8/18/2025	Paid Amt: Check Amount:	\$85.00 \$85.00
SHBC	18619 1222			Blue Cross/Blue Shield of MN		Check	
		B 01	215	016			\$86.96
PO#:	Voucher #:	14247	Invoice	Invoice No: 250801260910	8/18/2025	Paid Amt: Check Amount:	\$86.96 \$86.96
SHBC	18620 1509			Brothers Fire & Security		Check	
		E 01	005	810 000 000 305			\$436.00
PO#:	Voucher #:	14249	Invoice	Invoice No: W43038	8/18/2025	Paid Amt: Check Amount:	\$436.00 \$436.00

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	18621	1283		City View Electric Inc.		Check	
			E 01 005 810 000 000 305	Annual Fire Alarm Inspection			\$485.00
PO#:	Voucher #:	14250	Invoice	Invoice No: 49040	8/18/2025	Paid Amt:	\$485.00
						Check Amount:	\$485.00
SHBC	18622	1045		CIMERDC		Check	
			E 01 005 110 000 000 465	Copier Base Rate/Usage			\$87.14
PO#:	Voucher #:	14251	Invoice	Invoice No: 57333	8/18/2025	Paid Amt:	\$87.14
						Check Amount:	\$87.14
SHBC	18623	1612		Colonial Life		Check	
			B 01 215 011	Supplemental Benefits-07/01, 07/16			\$61.84
PO#:	Voucher #:	14252	Invoice	Invoice No: 5714381-0701338	8/18/2025	Paid Amt:	\$61.84
						Check Amount:	\$61.84
SHBC	18624	1674		Great River Regional Library		Check	
			E 01 005 110 000 000 305	Missing Library Books			\$46.99
PO#:	Voucher #:	14253	Invoice	Invoice No: DT073125	8/18/2025	Paid Amt:	\$46.99
						Check Amount:	\$46.99
SHBC	18625	1070		Hoglund Transportation, Inc.		Check	
			E 01 005 760 000 723 360	ESY Transportation 06/20/25-07/17/25 Van 109			\$1,933.25
			E 01 005 760 000 723 360	ESY Transportation 06/20/25-07/17/25 Van 150			\$1,933.25
PO#:	Voucher #:	14254	Invoice	Invoice No: 216280	8/18/2025	Paid Amt:	\$3,866.50
						Check Amount:	\$3,866.50
SHBC	18626	1700		JD Outdoor Services		Check	
			E 01 005 810 000 000 305	Commercial Services			\$470.38
PO#:	Voucher #:	14255	Invoice	Invoice No: 5254	8/18/2025	Paid Amt:	\$470.38
						Check Amount:	\$470.38
SHBC	18627	1130		JMC COMPUTER SERVICES INC		Check	
			E 01 005 110 000 000 405	Software License 2025-2026			\$2,758.32
PO#:	Voucher #:	14256	Invoice	Invoice No: 3782	8/18/2025	Paid Amt:	\$2,758.32
						Check Amount:	\$2,758.32
SHBC	18628	1044		Julie Halvorson		Check	
			E 01 010 203 000 000 430	Reimbursement-Classroom Supplies			\$130.88
PO#:	Voucher #:	14257	Invoice	Invoice No: DT072325	8/18/2025	Paid Amt:	\$130.88
						Check Amount:	\$130.88

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	18629	1549		Loffler Companies, INC		Check	
			E 01	005 110 000 000 465	Copier - 08/01/25-08/31/25		\$149.50
PO#:	Voucher #:	14258	Invoice	Invoice No: 5091226	8/18/2025	Paid Amt:	\$149.50
						Check Amount:	\$149.50
SHBC	18630	1288		M & M Carpet Cleaning		Check	
			E 01	005 810 000 000 305	carpet and rug cleaning		\$1,400.00
PO#:	Voucher #:	14259	Invoice	Invoice No: 1698	8/18/2025	Paid Amt:	\$1,400.00
						Check Amount:	\$1,400.00
SHBC	18631	1618		MN PEIP		Check	
			B 01	215 015	Health Insurance -08/01/25-08/31/25		\$6,598.20
PO#:	Voucher #:	14260	Invoice	Invoice No: 1535129	8/18/2025	Paid Amt:	\$6,598.20
						Check Amount:	\$6,598.20
SHBC	18632	1699		Navigate Care Consulting		Check	
			E 01	010 640 000 000 366	Staff PD		\$250.00
PO#:	Voucher #:	14261	Invoice	Invoice No: INV-000401	8/18/2025	Paid Amt:	\$250.00
						Check Amount:	\$250.00
SHBC	18633	1661		Nova Education Consultants		Check	
			E 01	010 420 000 419 303	SpEd Director 07/28/25-08/05/25 2.25h @\$150		\$337.50
PO#:	Voucher #:	14262	Invoice	Invoice No: 3434	8/18/2025	Paid Amt:	\$337.50
			E 01	010 420 000 419 303	SpEd Director K Zehowski 07/14/25-07/23/25 2h		\$3,955.50
			E 01	010 410 000 740 394	OT Specialist E Boughner 07/14/25-07/23/25 20		\$2,050.00
PO#:	Voucher #:	14263	Invoice	Invoice No: 3403	8/18/2025	Paid Amt:	\$6,005.50
						Check Amount:	\$6,343.00
SHBC	18634	1078		Osprey Wilds ELC		Check	
			E 01	005 110 000 000 820	Autherizer Fees FY26		\$9,257.74
PO#:	Voucher #:	14269	Invoice	Invoice No: FY26-01	8/18/2025	Paid Amt:	\$9,257.74
						Check Amount:	\$9,257.74
SHBC	18635	1698		Rebecca McMullens		Check	
			E 01	005 110 000 000 305	MARS Reporting 07/07/25-07/30/25		\$680.00
PO#:	Voucher #:	14265	Invoice	Invoice No: 730	8/18/2025	Paid Amt:	\$680.00
						Check Amount:	\$680.00
SHBC	18636	1585		Scholastic INC		Check	
			E 01	010 203 000 000 430	Classroom Books		\$288.75
PO#:	Voucher #:	14266	Invoice	Invoice No: M7626525 5	8/18/2025	Paid Amt:	\$288.75
			E 01	010 203 000 000 430	Classroom Books		\$275.00
PO#:	Voucher #:	14267	Invoice	Invoice No: M7613997 1	8/18/2025	Paid Amt:	\$275.00

Bank	Check No	Code	Rcd	Vendor	Pmt/Void Date	Pmt Type	
SHBC	18636	1585		Scholastic INC		Check	
			E 01 010 203 000 430	Classroom Books			\$103.13
PO#:	Voucher #:	14268	Invoice	Invoice No: M7608124 9	8/18/2025	Paid Amt:	\$103.13
						Check Amount:	\$666.88
SHBC	18637	1344		School Speciality		Check	
			E 01 010 203 000 401	School Supplies			\$107.97
PO#:	Voucher #:	14270	Invoice	Invoice No: 208135865369	8/18/2025	Paid Amt:	\$107.97
						Check Amount:	\$107.97
SHBC	18638	1087		Sora Pediatric Therapy		Check	
			E 01 010 401 000 740 394	Speech Specialist 08/16/25 6h @ \$88			\$528.00
PO#:	Voucher #:	14271	Invoice	Invoice No: 080125121591	8/18/2025	Paid Amt:	\$528.00
						Check Amount:	\$528.00
SHBC	18639	1067		WH Security, LLC		Check	
			E 01 005 810 000 305	Alarm monitoring			\$227.95
PO#:	Voucher #:	14272	Invoice	Invoice No: DT072925	8/18/2025	Paid Amt:	\$227.95
						Check Amount:	\$227.95
SHBC	18640	1275		WM Corporate Services, INC		Check	
			E 01 005 810 000 330	Garbage/Recycling-August			\$612.91
PO#:	Voucher #:	14273	Invoice	Invoice No: 7380777-1767-1	8/18/2025	Paid Amt:	\$612.91
						Check Amount:	\$612.91
SHBC	18641	1278		Nicole Perez		Check	
			E 01 005 110 000 401	Reimbursement- Pape			\$20.77
PO#:	Voucher #:	14159	Invoice	Invoice No: DT042325	8/20/2025	Paid Amt:	\$20.77
						Check Amount:	\$20.77
SHBC	18642	1606		The Master Teacher		Check	
			E 01 010 400 640 372 366	Para educator Online Training			\$132.00
			E 01 010 400 640 372 366	Para educator Online Training			(\$132.00)
			E 01 010 420 640 419 366	Para educator Online Training			\$132.00
PO#:	Voucher #:	13862	Invoice	Invoice No: 116805479	8/20/2025	Paid Amt:	\$132.00
						Check Amount:	\$132.00
SHBC	18643	1636		EdFinMN		Check	
			E 01 005 110 000 305	Accounting/Consulting Fees -August			\$4,635.00
PO#:	Voucher #:	14292	Invoice	Invoice No: 2564	8/27/2025	Paid Amt:	\$4,635.00
						Check Amount:	\$4,635.00
						Report Total:	\$98,481.92

Swan River Montessori # 4137
Receipt Listing Report with Detail by Deposit

Deposit Co	Bank	Batch	Rct No	Receipt Type	Receipt St	Date	Check No	Pmt Type	Grp Code	Customer	Inv No	Inv Date	Inv Type	Invoice Amount	Applied Amount	Unapplied Amount															
3370 08.12.25 MEGS	4137 SHBC	D0825	3427	Credit	A	08/12/25		Check	1	MDE					3,919.41	0.00															
						4137	B 01 122 000										FY25 F425														
						4137	B 01 122 000										FY25 F419														
						Receipt Total:															\$4,179.55	\$0.00									
						Deposit Total:															\$4,179.55	\$0.00									
3371 08.15.25 IDEAS	4137 SHBC	D0825	3428	Credit	A	08/15/25		Check	1	MDE					70,686.69	0.00															
						4137	R 01 005 000										General Education Aid														
						Receipt Total:															\$70,686.69	\$0.00									
						Deposit Total:															\$70,686.69	\$0.00									
						3372 08.30.25 IDEAS	4137 SHBC										D0825	3429	Credit	A	08/28/25		Check	1	MDE					600.00	0.00
4137	B 01 121 000	FY25-F343 Library Aid																													
4137	B 01 121 000	FY25-F373 Student Support																													
4137	B 01 121 000	FY25-F312 Literacy Incent																													
4137	B 01 121 000	FY25-F317 LT Facility Maint.																													
4137	B 01 121 000	FY25-F348 Chart School Leas																													
4137	B 01 121 000	FY25-S211 GenEd Aid																													
4137	R 01 005 000	State Special Education Aid																													
4137	B 01 121 000	FY25-Sped Educ.																													
Receipt Total:															\$295,338.88	\$0.00															
Deposit Total:															\$295,338.88	\$0.00															
3373 Interest-August	4137 SHBC	D0825	3430	Credit	A	08/31/25		Check	1	Misc					473.45	0.00															
						4137	R 01 005 000										Interest Earnings														
						Receipt Total:															\$473.45	\$0.00									
						Deposit Total:															\$473.45	\$0.00									
						Report Total:															\$370,678.57	\$0.00									

SWAN RIVER MONTESSORI CHARTER SCHOOL

School Board Meeting

Tuesday, August 19, 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: Claire Belknap, Nicole Perez, Rick Freese, Jana Evink, Amy Savage, Julie Halvorson, Amy Jensen
- b. Board Members Absent: none
- c. Other Attendees: Annette Vemuri- school director, Addie Washington- OW Authorizer
- 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 with addition of Parent/Student Handbook Added to New Business made by Jensen, Seconded by Halvoron . Board Vote- all aye- motion carries

V. DECLARATION OF CONFLICTS-

VI. FINANCIAL REPORT

The following was discussed during the SRMCS School Board Finance Committee Meeting:

June Financial Report - end of Fiscal Year 2025 (FY25)

June Financial Report - end of Fiscal Year 2025 (FY25)

Adopted Budget: 163 ADM (Average Daily Membership)

Working Budget: 163 ADM

- Actual ADM 166
- 100% Percent of the fiscal year completed
- 102% YTD revenue as a percent of budget based on the working budget.
- 98% 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

SRMCS ended the FY25 school year with good financial standing.

The yearly audit was completed during August. Swan River will see a finding due to slow processing of paying bills. State statute says we have to pay our bills within 35 days if not disputing. Bills have been paid much later than 35 days consistently. Annette is aware of this finding and will work with our operations manager to make sure the procedures are followed and bills are paid on time. Digital invoices will now go to an "accounts payable" email address rather than a specific employee email. The board will check back on this issue in September to see if there was improvement.

Motion to approve June financials made by Freese, Seconded by Savage. Board Vote- all aye, motion carries

July Financial Report- beginning of Fiscal Year 2026 (FY26)

Best financials of the year! Only shows building expenses since the bulk of expenses comes during the school year.

Motion to approve July financials made by JH, Seconded by NP . Board Vote- all aye, motion carries

FY25 Enrollment Numbers as of 8.18.25

- i. Charter School (K-6) = 163
- ii. Children's House (EC) = 13
- iii. Pupil Unit Actual/Budget = 163/165
- iv. Enrollment Coordinator Update- offers are pending to fill 2 spots in kindergarten. Amy Jensen will continue to work to fill spots. There continues to be a waiting list from which to draw.

b. Review of Bills- reviewed

c. Donations- none

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

a. June Minutes

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- -

- ERate grant update: comes out in December
- Science of Reading Curriculum- Ms Sharon and Ms Amber are leading looking into the curriculum review. They will update lead staff on Monday
- Monticello Community Center- no agreement yet, MCC included swimming in their proposed agreement but we do not want to go swimming this year.
- SRMCS has applied for our Lease Aid despite not having an agreement with MCC.

XII. OLD BUSINESS

XIII. NEW BUSINESS

a. Establish Board roles

- i. Motion to approve Jana Evink as board chair, Amy Jensen as Secretary and Amy Savage as Treasurer made by RF, Seconded by CB. Board Vote- all aye, motion carries

Chair- Jana Evink,
Secretary- Amy Jensen
Treasurer- Amy Savage

b. Annual Designations:

- i. Depository- Annettee Vemuri, school director, Bridget Peterson of Edfin
- ii. Electronic Funds Transfer- Annettee Vemuri, Bridget Peterson of Edfin
- iii. Communication

Motion to approve the above made by JH, Seconded by RF. Board Vote- all aye, motion carries

- c. Board Resolution for IOWA - Motion to appoint AV as the IOWA made by AS, Seconded by JH
- d. Set Wellness Committee Mtg.- The committee will consist of JH, AS and AV. Will meet on Monday, September 15 at 7 AM in Amy Savage's classroom.
- e. Set World's Best Workforce Plan Committee Mtg.- Committee will meet on Tuesday, October 14 at 3:30 PM
- f. Addendum to Lease Agreement- Addition of Property 503 Maple Street- Motion RF, Second AS, all aye, motion carries

New Policies

- g. Electronic Funds Transfers Policy- Motion RF, Second NP, all aye
- h. Selection & Review of Library & Instruction Materials Policy- Motion JH, Second AS. All aye
- i. Staff Evaluation & Professional Development Policy- Motion JH, Second RF, all aye
- j. Student Cell Phone Policy- now also included in Parent/Student Handbook- Motion AJ, Second CB. All aye- motion carries
- k. Student Surveys Policy- Motion to approve CB, Second AS. All aye- motion carries
- l. Title IX Sex Non-Discrimination Policy, Grievance Procedure and Process- Motion to approve AJ, Second CB. all aye- motion carries
- m. Purchasing, Procurements & Contracting Policy- Motion to approve made by AS, Second by NP. all aye- motion carries

Old Policies

- n. eLearning Policy & Plan- reviewed, no changes
- o. Parent/Student Handbook- Annette added cell phone policy & grievance policy and updated dress code & school lunch information. Motion to approve Parent/Student Handbook changes made by AJ, Second AS. all aye- motion carries

XIV. REVIEW OF NEXT MEETING AGENDA

- a. Date, Time & Location of next Board Meeting: Tuesday, September 16, 2025 at 2:30 PM

Upcoming Agenda Items- FY26

Old Business

Crisis Management Policy

New Business

Approve Insurance Coverage

Board Member Statements of Assurance & Oath of Office documents

Equal Educational Opportunity Policy

Purchasing Policy

Compensation for Substitutes Policy

Internet Acceptable Use & Safety Policy

Application & Enrollment Procedures Policy

Background Checks Policy

Intellectual Property Policy
Meal Charge and Serving Procedures Policy
Pledge of Allegiance Policy
Progress on Director Goals
List of Professional Development for Staff

XV. MOTION TO ADJOURN by NP at 3:29 PM, Seconded by AS. Board Vote- all aye, motion carries

SWAN RIVER MONTESSORI CHARTER SCHOOL
Application for Charter School Renewal



Submitted on: September 15, 2025
Prepared by: Annette Vemuri

Board members present at the meeting at which this application was approved must sign below (add additional lines as necessary).

*By our signatures below, we affirm that this application was approved by majority vote of the board in public session on **Enter Date of Board Approval**.*

Board Member Signature

Board Member Signature

Board Member Signature

Board Member Signature

Board Member Signature

Board Member Signature

Board Member Signature

Board Member Signature

Board Member Signature

Board Member Signature

Submit to csdadmin@ospreywilds.org by the deadline of **September 15**. If the deadline falls on a weekend or non-business day, the deadline moves to the following business day.

By approval and submission of this application, the school agrees to the terms of the base charter contract (no exhibits) without modification. The base charter contract is available on the [Osprey Wilds website](#).

Board Chair Signature

School Leader Signature

PART A: CONTRACT FULFILLMENT

Mission, Vision, and Statutory Purposes

Swan River Montessori Charter School (SRMCS) is grounded in the mission of providing a child-centered environment for self-directed and personalized learning within a small, community-based public school that emphasizes the natural environment. This mission reflects the Montessori philosophy of honoring the child's intrinsic motivation to learn and grow at their own pace.

The school's vision expands upon this by aiming to teach the whole child, heart, mind, and soul, through an interdisciplinary, community-engaged, and nature-connected approach. SRMCS envisions an educational community where children experience a sense of belonging, are encouraged to discover and create, and where learning is deeply collaborative, engaging families, teachers, and the wider community.

Aligned with the school's charter and its authorizer Osprey Wilds, SRMCS's statutory purpose includes demonstrating growth in four key areas of child development: Normalization, Independence, Social/Emotional Wellbeing, and Community Engagement, according to the Montessori Planes of Development.

Progress Toward Fulfilling the Mission and Evaluation Indicator 1.1

SRMCS has made demonstrable progress in fulfilling the expectations of its charter through a locally-developed Montessori assessment rubric, which evaluates student development in the four targeted domains across both fall and spring assessment periods.

- Normalization is evaluated by the student's love of work, self-discipline, concentration, and sociability.
- Social/Emotional Wellbeing reflects emotional management, empathy, self-esteem, and relationships.
- Independence focuses on autonomy, individuation, and self-regulation.
- Community Engagement measures peer collaboration, communication, and active classroom participation.

The rubric includes a 1–4 point scale for each domain, allowing educators to quantitatively track and compare growth across the academic year. This structured approach supports the Montessori model and ensures alignment with developmental goals outlined in the charter. From 2021 to 2025, SRMCS students achieved an average score of 12.6 out of 16 on this assessment. The school had set a target of 12.0, and this average performance meets the goal, demonstrating consistent and measurable growth in the developmental domains outlined by the Montessori Planes of Development.

This performance not only validates the effectiveness of SRMCS's instructional model but also reinforces the school's commitment to educating the whole child. By meeting and exceeding this benchmark, the school has upheld its mission and successfully fulfilled the expectations of Operations Performance Evaluation Indicator 1.1 as outlined in the charter contract with Osprey Wilds.

Instructional Program and Curriculum Narrative

(Operations Performance Evaluation Indicators 1.2 & 1.3)

The instructional program at Swan River Montessori Charter School (SRMCS) is firmly rooted in the authentic Montessori philosophy and aligned with the school's mission of educating the whole child—heart, mind, and soul—through an interdisciplinary, community-engaged, and nature-connected approach. The program emphasizes normalization, independence, social and emotional wellbeing, and community engagement, consistent with the Montessori Planes of Development and Minnesota's statutory purposes for charter schools.

Elementary Program

SRMCS offers a comprehensive elementary program divided into Elementary Level I (grades 1–3) and Elementary Level II (grades 4–6), each structured in three-year cycles. This multi-age classroom setting allows students to progress at their own developmental pace while fostering leadership, mentorship, and deep community engagement. As students advance, they naturally assume leadership roles, reinforcing learning by mentoring younger peers, which cultivates both independence and social responsibility—core to the school's mission.

Instruction is guided by Montessori-certified and state-licensed teachers who use hands-on, inquiry-based Montessori materials rather than traditional textbooks. Teachers act as facilitators, supporting student-led exploration in classrooms designed as rich learning environments. The spiral curriculum revisits and expands upon core concepts across multiple years, ensuring that students develop layered, enduring understandings. Students also learn to conduct independent research using classroom libraries, public resources, and digital tools, which builds critical thinking, self-direction, and problem-solving skills.

Unique to SRMCS's elementary program is its integration of environmental education. Children regularly engage in outdoor learning, gardening, and place-based projects that deepen their ecological literacy and connect them to natural systems. In addition, the program prioritizes collaborative work and peer mentoring, ensuring that academic rigor is paired with community-building and social development.

Breadth and Depth of Curriculum

While Montessori does not follow a traditional grade-level sequence, SRMCS ensures full alignment with Minnesota State Standards. Through a multi-year initiative, Montessori math, reading, science, and social studies materials were carefully mapped to state standards, guaranteeing complete content coverage within each three-year cycle. Teachers and administrators continuously review and update this alignment to reflect evolving state requirements. This process allows SRMCS to preserve the integrity of Montessori pedagogy while also meeting accountability benchmarks.

The curriculum is comprehensive and integrated both vertically and horizontally across grade levels. It incorporates evidence-based instructional strategies, systematic differentiation, and interventions to ensure growth for all learners. Students receive developmentally appropriate lessons, sometimes earlier or later than peers in conventional classrooms, but always within a structure that ensures mastery of standards by the end of the cycle.

Environmental education and culturally responsive instruction are intentionally woven throughout the curriculum. Teachers actively incorporate students' backgrounds, languages, and identities as assets to learning, thereby supporting equity and inclusion while also nurturing the whole child.

Alignment to Mission

The SRMCS instructional program reflects and advances the school's mission by creating a learning community where children experience belonging, are encouraged to discover and create, and engage in deeply collaborative learning. Instructional practices and curricular design consistently integrate Montessori philosophy, environmental education, and state standards. In this way, SRMCS fulfills both statutory compliance and its mission to teach the whole child—heart, mind, and soul.

Complete the table below. Provide the names of the school's evidence-based curriculum and practices. Remove columns that are not relevant. (See Operations Performance Evaluation Indicator 1.3)

Early Learning Curriculum (Preschool / Prekindergarten)		
ECIPs Domain		Curriculum
Approaches to Learning		Montessori Education Curriculum aligned to MN State Standards
The Arts		Montessori Education Curriculum aligned to MN State Standards
Language, Literacy, and Communications		Montessori Education Curriculum aligned to MN State Standards
Mathematics – Cognitive		Montessori Education Curriculum aligned to MN State Standards
Physical and Movement Development		Montessori Education Curriculum aligned to MN State Standards
Scientific Thinking – Cognitive		Montessori Education Curriculum aligned to MN State Standards
Social and Emotional Development		Montessori Education Curriculum aligned to MN State Standards
Social Systems – Cognitive		Montessori Education Curriculum aligned to MN State Standards
Reading & Writing Curriculum & Practices		
Tier	Primary (K-2)	Elementary (3-6)
Tier 1	Montessori Language Arts sequence (phonics, word study, grammar, sentence analysis, literature circles, writing workshops); aligned to MN ELA standards	Montessori Upper Elementary Language Arts sequence (research projects, advanced grammar, literature studies,

		writing across genres); aligned to MN ELA standards
Tier 2	Small group guided reading, targeted phonics and fluency interventions, individualized writing supports	Targeted comprehension and written expression groups, progress-monitoring with formative assessments
Tier 3	One-on-one reading interventions using Wilson-informed strategies; individualized IEP/504 accommodations	Intensive individualized supports in reading/writing tied to IEP/504 goals; pull-out or push-in support from SPED teachers
Math Curriculum & Practices		
Tier	Primary (K-2)	Elementary (3-6)
Tier 1	Montessori Math sequence (golden bead materials, number sense, operations, place value, geometry foundations); aligned to MN Math Standards	Montessori Upper Elementary Math sequence (fractions, decimals, percentages, geometry, pre-algebra concepts, problem-solving); aligned to MN Math Standard
Tier 2	Small-group lessons with Montessori materials or FastBridge interventions for students needing reteaching or acceleration	Small-group lessons with Montessori materials or FastBridge interventions for students needing reteaching or acceleration
Tier 3	Individualized math intervention plans using evidence-based strategies and manipulatives; SPED support as needed	Intensive individualized interventions aligned with IEP/504s; pull-out or push-in support from SPED teachers
Science Curriculum & Practices		
Tier	Primary (K-2)	Elementary (3-6)
Tier 1	Montessori Education (introduction to the universe, life sciences, physical sciences, geography); integrated hands-on inquiry	Expanded Montessori Education (Great Lessons, Earth/space science, biology, chemistry foundations, environmental education); aligned to MN Science Standards
Tier 2	Small-group science extensions and enrichment projects for students needing additional support or challenge	Targeted support in scientific vocabulary, research, and lab work; project-based groupings
Tier 3	Individualized scaffolding for scientific concepts (language-based supports, hands-on sensory materials)	Intensive individualized supports (modifications per IEP, scaffolded lab activities, environmental projects with SPED support)

Instructional Leadership and Staffing Narrative

(Operations Performance Evaluation Indicator 1.1)

At Swan River Montessori Charter School (SRMCS), instructional leadership and staffing are purposefully organized to advance the school's mission of educating the whole child—heart, mind, and soul—through an interdisciplinary, community-engaged, and nature-connected Montessori approach.

Leadership Structure

The School Board provides governance, policy oversight, and accountability for fulfilling the school's charter and statutory purposes. The School Director serves as the instructional and operational leader, ensuring fidelity to the Montessori philosophy, compliance with Minnesota academic standards, and alignment with the school's mission. The Director oversees all educational programming, supervises instructional staff, and coordinates professional development to ensure consistent, high-quality implementation of the curriculum.

Instructional Staff

Instruction is delivered by Montessori-certified and state-licensed lead teachers across program levels:

- Children's House Lead Teachers (Kindergarten)
- Elementary I (E1) Lead Teachers, Grades 1–3
- Elementary II (E2) Lead Teachers, Grades 4–6

Each classroom operates in a multi-age, three-year cycle that fosters mentorship, leadership, and developmental progression consistent with Montessori pedagogy. Lead teachers guide instruction through hands-on Montessori materials, individualized lessons, and inquiry-based learning.

The Special Education Coordinator/Director provides oversight and support for students with exceptional needs, ensuring compliance with IDEA and state special education requirements. Assistants and paraprofessionals support classroom instruction, individualized interventions, and the holistic development of each student.

Community Engagement

Parents, volunteers, students, and the PTO are integral partners in the educational program. Their involvement strengthens the school community, fosters collaboration, and extends the Montessori philosophy beyond the classroom.

Alignment to Mission

This staffing model ensures that every child receives personalized, developmentally appropriate instruction within a nurturing, collaborative environment. The governance and leadership structure provides accountability, while teachers and support staff embody the school's mission through child-centered practice, environmental education, and strong community partnerships.

Instructional Leadership and Staffing Organization in Support of the School Mission

Swan River Montessori Charter School (SRMCS) organizes its instructional leadership and staffing with intentional alignment to its mission of providing a child-centered, self-directed, and personalized Montessori education in a public school setting. The school is widely recognized for offering an authentic Montessori learning environment, and every aspect of its leadership and instructional model is designed to uphold this core identity.

To ensure fidelity to Montessori principles, SRMCS requires that the School Director and all general education lead teachers hold Montessori certification in addition to valid Minnesota

teaching licenses. This specialized training, which exceeds standard licensure preparation, equips instructional leaders with the philosophical grounding and practical skills necessary to foster independence, creativity, and whole-child development—key components of the SRMCS mission. Teachers are not only classroom leaders but also serve in governance roles, holding multiple seats on the Board of Directors and actively contributing to decisions around curriculum, instruction, and school-wide goals.

Support staff, while not required to be Montessori certified, are given access to ongoing professional development in Montessori theory and its practical application in the classroom. This ensures that all adults working with students, whether in instructional or support roles, understand and reinforce the Montessori approach, helping to sustain a consistent, mission-aligned educational culture throughout the school.

Assessment and Evaluation of Student Learning and Growth

(Operations Performance Evaluation Indicator 1.4)

SRMC employs a comprehensive system for assessing and evaluating student learning and growth that integrates Montessori practices with Minnesota State Standards and statutory requirements. The process ensures that all students demonstrate academic proficiency and growth while supporting the school's mission of educating the whole child—heart, mind, and soul.

Assessment Practices

- **Montessori Formative Assessments:** Teachers conduct daily observations within work cycles, documenting student progress through lesson records, demonstration of mastery with Montessori materials, and student engagement. This formative approach is a cornerstone of Montessori pedagogy, allowing individualized monitoring of learning.
- **Standards-Based Assessments:** SRMCS administers the Minnesota Comprehensive Assessments (MCAs) and other state-required assessments to ensure accountability and alignment with state benchmarks.
- **Benchmark and Progress Monitoring (FastBridge):** The school utilizes FastBridge for universal screening and ongoing progress monitoring in reading and math. FastBridge data provides actionable insights into student proficiency, growth, and areas of need. These results guide instructional planning, support the Multi-Tiered System of Supports (MTSS), and ensure timely interventions.
- **Environmental and Project-Based Assessments:** In line with SRMCS's mission, environmental education projects and research-based assignments are used to assess applied knowledge, problem-solving, and collaboration skills.

Evaluation and Data Use

- **Individualized Evaluation:** Within the three-year Montessori cycle, teachers ensure mastery of academic content at developmentally appropriate times, allowing for both acceleration and reinforcement.

- **Data-Informed Instruction:** FastBridge benchmarks and progress-monitoring data are systematically reviewed alongside Montessori records to identify trends, guide differentiation, and determine the need for Tier 2 or Tier 3 supports.
- **School-Wide Review:** Leadership and instructional staff review aggregate MCA and FastBridge results during professional development sessions, ensuring continuous alignment with charter goals and Minnesota State Standards.
- **SPED and ELL Compliance:** Students with Individualized Education Programs (IEPs) and English Learners are assessed according to state and federal guidelines, with FastBridge results incorporated into intervention planning and progress reporting.

Alignment with Mission

SRMCS's assessment and evaluation process reflects its mission by balancing academic proficiency with social-emotional development. The integration of Montessori formative assessments, FastBridge benchmark data, and environmental projects ensures a holistic picture of student growth. This approach both demonstrates accountability to standards and supports SRMCS's vision of educating the whole child—heart, mind, and soul.

Review and Evaluation of Instruction and Curriculum

(Operations Performance Evaluation Indicator 1.3)

SRMCS uses a structured, evidence-based process to review and evaluate the effectiveness of its instructional practices and curriculum. This process balances Montessori pedagogy with Minnesota State Standards to ensure that all students meet proficiency benchmarks while honoring the school's mission to educate the whole child—heart, mind, and soul.

Curriculum Review Process

- **Alignment to Standards:** SRMCS has mapped all Montessori math, reading, science, and social studies materials to Minnesota State Standards, ensuring full coverage across the three-year Montessori cycles. Administrators and instructional staff continuously update this alignment when standards are revised.
- **Curriculum Monitoring:** Teachers document lesson delivery and student progress using Montessori lesson records, curriculum maps, and pacing guides. These tools help ensure vertical and horizontal alignment across grade levels.
- **Assessment Data Integration:** FastBridge benchmark and progress monitoring data, MCA results, and classroom-based assessments are regularly reviewed to evaluate whether the curriculum supports student proficiency and growth.

Instructional Review Process

- **Observations and Coaching:** The School Director and lead teachers conduct regular classroom observations to ensure instructional fidelity to both Montessori methods and state standards. Teachers receive feedback and coaching as part of an ongoing professional development cycle.
- **Professional Development:** Staff engage in targeted professional learning communities (PLCs), training sessions, and workshops that are responsive to instructional needs identified through data review.

Process for Addressing Ineffectiveness

- **Data-Driven Adjustments:** When FastBridge data, MCA performance, or Montessori progress records indicate gaps in student learning, staff and leadership collaboratively analyze the root causes. Instructional strategies and pacing are adjusted accordingly.
- **Curriculum Revisions:** If specific materials or sequences are found ineffective, the school consults with Montessori-certified staff and administrators to adopt new strategies or supplemental resources while maintaining Montessori integrity.
- **Tiered Interventions:** Students requiring additional support receive targeted instruction through small-group or individualized interventions, ensuring curriculum delivery remains equitable and effective.
- **Ongoing Evaluation:** Effectiveness of any changes is reassessed through subsequent cycles of FastBridge benchmarks, classroom observations, and student performance data, ensuring continuous improvement.

Alignment to Mission

This process ensures SRMCS maintains a comprehensive, evidence-based, and mission-aligned curriculum. Through a continuous cycle of review, data analysis, instructional coaching, and curricular refinement, the school ensures that instruction remains effective, responsive, and consistent with the Montessori philosophy and state accountability standards.

Practices and Programming for Remediation and Acceleration

(Operations Performance Evaluation Indicator 1.3)

At Swan River Montessori Charter School (SRMCS), remediation and acceleration are thoughtfully integrated into the instructional framework through the flexible and individualized nature of the Montessori method. When a student struggles with a particular concept or skill, the teacher adapts the learning environment and materials to meet that child's unique developmental needs. This may involve revisiting foundational lessons, using alternative hands-on materials, or adjusting pacing. Students benefit from working in multi-age classrooms over three-year cycles, where teachers build deep relationships and a comprehensive understanding of each learner's strengths and challenges. This structure allows for ongoing, responsive modifications to instruction that support both intervention and growth.

For students requiring more targeted support, SRMCS utilizes a structured Response to Intervention (RTI) process. Students flagged by teachers for academic concerns are referred to the Child Find Team, which includes the classroom teacher, special education staff, literacy specialist, school director, and when appropriate, the special education director. This team develops and monitors intervention plans over 4–6 weeks, using progress data to determine next steps. If needed, additional interventions or a referral for special education evaluation may follow. SRMCS also

employs an on-site RTI specialist to work with students in reading and math who require extra support but do not qualify for special education services.

Acceleration is also carefully managed to ensure students are appropriately challenged. Teachers differentiate instruction daily within the classroom, offering advanced lessons, independent projects, and peer mentoring opportunities. In cases where formal grade acceleration is considered, SRMCS follows a policy-based process to evaluate readiness and determine the best path forward, always with the child's long-term success and well-being in mind. These practices ensure that every student—regardless of ability—receives the support or challenge needed to thrive in a child-centered, Montessori-aligned learning environment.

Structures and Practices to Serve English Learners

(Operations Performance Evaluation Indicator 1.10)

Swan River Montessori Charter School (SRMCS) is committed to providing equitable access to education for all students, including English Learners (ELs). Although the school has not enrolled any students qualifying as English Learners during the current charter contract term, structures are in place to ensure readiness should the need arise. Every new student completes a Home Language Questionnaire as part of the enrollment process. If a language other than English is indicated, the school convenes an EL Team, including the school director, classroom teacher, special education representative, and the student's parents, to assess the student's needs and determine appropriate next steps.

In the event, that EL services are needed, SRMCS is prepared to implement appropriate supports, including language assessments, individualized learning plans, and accommodations aligned with state and federal guidelines. The school is also committed to fostering inclusive practices and professional development to support language diversity within the Montessori environment. While EL programming has not been activated during this contract period, the foundational structures are in place to ensure all students, regardless of language background, receive a high-quality and supportive education.

Special Education Program and Practices

(Operations Performance Evaluation Indicator 1.9)

Swan River Montessori Charter School (SRMCS) is committed to ensuring that all students, including those with disabilities, receive high-quality, equitable educational opportunities in alignment with federal and state requirements. The school functions as its own Local Education Agency (LEA), meaning it is fully responsible for complying with the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act, and the Americans with Disabilities Act.

Child Find Process

SRMCS implements a comprehensive Child Find process to identify, locate, and evaluate children with suspected disabilities.

- **Universal Screening:** All students are screened three times per year (fall, winter, spring) using FastBridge assessments in reading and math. Kindergarten and first

grade use earlyMath, earlyReading, and CBMreading; grades 2–6 use aMath, aReading, autoReading, and CBMreading oral fluency.

- Teacher-Initiated Referral: Teachers may initiate Child Find by completing a referral form when they observe persistent academic, behavioral, social, or emotional concerns. Parents are notified at this stage.
- Child Find Team: The team includes the student's classroom teacher, general education staff, interventionists, and the School Director. This team reviews assessment data, identifies concerns, and recommends evidence-based interventions.
- Intervention Cycles: Interventions are implemented in 4–6 week cycles with progress monitoring. Teachers collect at least 12 data points (including baselines). If interventions are successful, they continue; if not, the team provides alternative interventions or refers the student for a special education evaluation.
- Evaluation and Eligibility: If pre-referral interventions are unsuccessful, an evaluation planning meeting is scheduled with parents. Evaluations are completed within 30 school days, and if eligibility criteria are met, an Individualized Education Program (IEP) is developed with parent participation.

Multi-Tiered System of Supports (MTSS) and RTI

SRMCS integrates Response to Intervention (RTI) within its Montessori framework:

- Tier 1: Montessori curriculum and core instruction for all students.
- Tier 2: Targeted small-group or individual supplemental interventions with monthly progress monitoring.
- Tier 3: Intensive, individualized interventions such as Reading Corps, Math Corps, or structured literacy supports.
- Tier 4: Special education services if eligibility is determined.

Specialized Supports

- Dyslexia Screening: As part of Minnesota's statute, SRMCS screens all students identified as not reading at grade level for characteristics of dyslexia using FastBridge and supplemental tools. A literacy specialist, trained in dyslexia screening, supports this process and intervention planning. Students demonstrating characteristics of dyslexia may receive explicit, systematic instruction through evidence-based programs such as the Wilson Reading System.
- Accessible Instructional Materials: Students with print disabilities (e.g., visual impairments, dyslexia) receive specialized materials in digital or audio formats to ensure equitable access.
- Collaboration with Families: Parents are engaged throughout the Child Find and evaluation process, from initial referral through IEP development and implementation.

Alignment to Mission

The special education program at SRMCS is designed to uphold the school's mission of educating the whole child—heart, mind, and soul—by ensuring that students with disabilities are supported through individualized, evidence-based interventions and inclusive practices. The combination of Montessori pedagogy, state-aligned assessments,

and a robust Child Find process ensures that students' unique needs are identified early and addressed effectively, fostering both academic and social-emotional growth.

Academic Performance

Reflection on Academic Performance in Relation to Charter Goals

(Operations Performance Evaluation Indicators 1.3 & 1.4)

Overall Performance

Through FY24, Swan River Montessori Charter School (SRMCS) earned 69.5 of 100 possible points (70%), making the school eligible for renewal under the terms of its charter contract. The evaluation showed a mixed performance profile: strong outcomes in reading and science, continued progress in mission-related outcomes, but persistent challenges in mathematics and student attendance.

Successes

1. Mission-Related Outcomes – SRMCS fully met its goal of demonstrating growth in the four Montessori developmental categories (normalization, independence, social/emotional wellbeing, and community engagement). The locally developed “Montessori Planes of Development: Student Growth Assessment” rubric showed consistent scores above target.
2. Reading Proficiency – Reading performance was a major strength. SRMCS exceeded its contractual goals, with students outperforming both the state and resident district on several measures. The aggregate proficiency index in reading was well above state averages across grade levels.
3. Science Proficiency – The school met its science proficiency goals, with 100% of points earned. Fifth-grade students consistently outperformed the state average in science assessments, underscoring the effectiveness of the Montessori science curriculum and the integration of environmental education.
4. Other Curricular Areas – Writing assessments demonstrated over 90% proficiency, and kindergarten readiness scores showed that the majority of preschool students entered kindergarten prepared for academic success.

Challenges

1. Mathematics Growth and Proficiency – Math remains the school's greatest academic challenge. SRMCS earned only 3 of 22 points (13.6%) for math growth, with most growth percentile measures below target. While math proficiency improved from “does not meet” in FY23 to “approaches” in FY24, performance levels still lag behind the state and resident district.
2. Attendance – The school did not meet its attendance goal, earning 0 of 6 points, with consistent attendance rates averaging around 77%, well below the 92% benchmark.

3. Reading Growth – Although overall reading proficiency was strong, growth measures showed uneven results, with some assessments indicating slower-than-expected progress for certain student groups.

Strategies to Address Challenges

1. Strengthening Mathematics Instruction

- Implement targeted math interventions using FastBridge data to identify students needing Tier 2 and Tier 3 support.
- Increase use of hands-on Montessori math materials in combination with evidence-based supplemental resources.
- Provide professional development for teachers in structured math instruction and differentiation.

2. Improving Attendance

- Strengthen family-school partnerships to address barriers to attendance, including transportation and health challenges.
- Implement positive attendance incentives and proactive communication with families when patterns of absenteeism emerge.
- Monitor attendance data more frequently to allow for timely interventions.

3. Enhancing Growth Outcomes

- Expand the use of formative assessments and progress monitoring to ensure that high proficiency levels translate into sustained growth.
- Increase collaboration within grade-level teaching teams to share effective instructional strategies and intervention practices.
- Focus on equity in growth outcomes, ensuring all subgroups—including students with IEPs—demonstrate consistent progress.

Conclusion

SRMCS has shown strong performance in reading, science, writing, and mission-related outcomes, demonstrating that its Montessori program provides a high-quality educational foundation. The school acknowledges challenges in math growth, proficiency, and student attendance, and has developed targeted strategies to address these areas. By strengthening math interventions, supporting families in improving attendance, and refining growth-focused instructional practices, SRMCS is positioned to build on its successes and ensure continued progress toward meeting the academic goals outlined in its charter contract.

Swan River Montessori Charter School (SRMCS) recognizes that academic outcomes tell only part of the story of student success. In addition to meeting core performance goals, the school monitors social and emotional development, attendance and retention, student engagement, and school climate to ensure that every child is supported in line with the mission to educate the whole child—heart, mind, and soul.

Students consistently demonstrate growth in independence, leadership, and social responsibility as measured by the locally developed Montessori Planes of Development rubric. Engagement in inquiry-based learning, environmental projects, and community

partnerships remains strong, reflecting Montessori's emphasis on curiosity and real-world application. Discipline incidents are minimal, supported by peace education and restorative practices that create a safe and supportive school culture.

At the same time, challenges remain. Attendance has averaged 77% and requires renewed focus through stronger family engagement, early identification of absenteeism, and incentive programs. Mathematics instruction, while improving, continues to lag behind state benchmarks and is being addressed through project-based applications, teacher collaboration, and targeted interventions informed by FastBridge progress monitoring.

By building on strengths in social-emotional growth, engagement, and school climate, while addressing attendance and mathematics outcomes with intentional strategies, SRMCS demonstrates its commitment to continuous improvement. These additional indicators provide a fuller picture of student growth and will help Osprey Wilds evaluate the school's success in delivering a comprehensive, whole-child education.

Environmental Education Performance

Environmental education (EE) is both a dedicated subject at Swan River Montessori Charter School (SRMCS) and an integrated part of Montessori classroom learning. This dual approach reflects our mission of educating the whole child—heart, mind, and soul—through community engagement and nature-connected education. The school's current contract identifies five EE performance indicators: awareness, knowledge, attitudes, skills, and action.

For awareness, our goal is that students perceive the relationship between ecological integrity and human activities. In 2023–24, Elementary I students studied wildlife populations, with 83% (62/76) showing growth on pre- and post-assessments. In 2024–25, Kindergarten students tracked recycling efforts, with 89% (41/46) accurately recording weekly data, while 100% of Elementary II students successfully created endangered animal projects. These results show students are developing a strong awareness of how human choices affect ecosystems.

For knowledge, the goal is that students demonstrate increased ecological understanding. In 2023–24, Elementary II students studied ecosystem change, and 79% (19/24 groups) met project goals. In 2024–25, Elementary I students studied energy consumption, with 90% (69/77) improving on assessments, and Elementary II students expanded this work, with 87.5% (49/56) increasing their knowledge scores. These results demonstrate consistent growth in environmental literacy across grade levels.

For attitudes, the goal is that students show positive values toward the environment. In 2023–24, Children's House and Kindergarten students grew gardens, reflecting care and ownership of their work. In 2024–25, student reflections on projects such as recycling and conservation indicated increased responsibility and pride. Rubric data confirmed this indicator was met in both years.

For skills, the goal is that students demonstrate the ability to apply ecological knowledge in practice. In 2023–24, students practiced composting, waste audits, and recycling strategies, earning a “Meets Standard” rating. In 2024–25, skill development expanded to include calculating energy savings and designing waste-reduction practices, again showing growth in applying environmental skills.

For action, the goal is that students take environmentally responsible steps consistent with their knowledge and values. In 2023–24, students implemented classroom recycling and waste audits, and in 2024–25 their projects expanded into energy conservation and endangered species campaigns. Both years saw over 80% of students sustaining their chosen actions, demonstrating that awareness, knowledge, and skills are translating into authentic behaviors.

Successes of the EE Program include achieving “Meets Standard” in all five indicators by FY23–24 and sustaining those results into FY24–25. Students are engaged in meaningful projects that connect learning to real-world environmental issues, from recycling to conservation. EE as a separate subject ensures direct instruction in ecological literacy, while integration into Montessori classrooms reinforces these lessons daily. The results show students are not only learning environmental concepts but also demonstrating positive attitudes, applying skills, and taking action.

Challenges of the EE Program include ensuring equity in participation so that all students, regardless of grade or background, have access to meaningful EE experiences. Sustaining engagement year over year can also be difficult, as initial enthusiasm sometimes tapers once projects end. Another challenge is measuring the long-term impact of EE beyond immediate assessments—for example, how students carry stewardship values into middle school and beyond.

To address these challenges, SRMCS will strengthen staff professional development to ensure consistent EE integration across classrooms, deepen partnerships with local environmental organizations to expand project opportunities, and develop longitudinal tracking tools to measure lasting outcomes of EE learning.

We would like Osprey Wilds to note that EE at SRMCS is not a peripheral activity but a central feature of our educational model. Students receive structured instruction in EE while also experiencing it as part of their daily work in Montessori classrooms. The combination of direct teaching, hands-on projects, and integrated application has allowed us to meet all five contract indicators and continue to prepare students as lifelong environmental stewards.

Financial Performance

Financial Successes and Challenges

During the current contract term, Swan River Montessori Charter School has navigated both significant challenges and notable successes in its financial operations. The most difficult period occurred during the COVID-19 pandemic and its immediate aftermath. Enrollment declined during this time, which caused the school's Average Daily Membership (ADM) to drop significantly below historic levels down to 136.7 in FY21. Because over 90% of revenue is enrollment-driven, this reduction in ADM directly impacted revenue and created financial strain, requiring careful budget management and the use of reserves to maintain programming and stability. Despite these challenges, the school has demonstrated strong financial resilience. Over the past five years, Swan River has steadily grown enrollment, reaching an ADM peak of 164. For multiple years of the contract term, the school has operated at or near its maximum capacity of 165 students, allowing for consistent planning and budgeting. A major financial success has been the growth of the General Fund balance. In FY21, the balance represented 24.7% of annual expenditures by FY24 it had increased to 30.8% (\$699,040). This strong reserve reflects prudent financial management and provides a safeguard against unexpected fluctuations in funding or expenses. It also positions the school well for future investments in programming, staffing, and facilities. However, some challenges remain. Special education expenditures continue to exceed \$880,000 annually, straining general resources even though reimbursements cover most costs. Food service has also run annual deficits, including shortfalls of \$6,500 in FY22 and \$13,000 in FY24, requiring close monitoring. Long-term obligations, including building debt and pension liabilities of more than \$3 million, continue to limit flexibility.

Conclusion

While the pandemic years highlighted the vulnerability of small schools to enrollment shifts, Swan River's financial management practices, recovery in ADM, strong fund balance, and consistent improvements in net position demonstrate resilience and sound stewardship. These successes ensure that the school is well-positioned to continue fulfilling its mission while maintaining long-term financial sustainability.

Reflection on Short-Term Financial Viability

SRMCS has maintained strong short-term financial viability during the current charter contract term, supported by prudent financial management and steady improvements in fund balance and net position.

Strengths

The school has consistently maintained a healthy fund balance, reaching over 30% of annual expenditures in the most recent year. This level of reserve exceeds state benchmarks for financial health and provides a safeguard for managing cash flow needs and unexpected costs. SRMCS has also steadily reduced its accumulated deficit, improving its net position by nearly \$600,000 over the course of the contract. Operating revenues have exceeded expenditures in recent years, demonstrating disciplined spending and balanced financial operations. In addition, the school has consistently received clean audit opinions, confirming sound financial management practices and compliance with financial regulations.

Weaknesses

As a small school, SRMCS's finances remain sensitive to enrollment fluctuations, since the majority of revenue is tied to student counts. While enrollment has been stable in recent years, even modest declines can impact revenues. The school also faces ongoing pressures from program costs, particularly in special education and food service, where expenditures have consistently outpaced revenues. Finally, long-term obligations, including building debt and pension liabilities, limit financial flexibility and require close monitoring to ensure sustainability.

Conclusion

Overall, SRMCS's short-term financial viability is strong. The school's healthy reserves, improved net position, balanced operations, and consistent compliance with financial requirements provide confidence in its ability to meet immediate obligations and support its mission. At the same time, continued attention to enrollment stability, cost management, and long-term debt will be critical to sustaining financial health in the years ahead.

Reflection on Long-Term Financial Sustainability

SRMCS has made significant progress toward long-term financial sustainability during the current charter contract, though challenges remain that require ongoing attention.

Strengths

One of the school's greatest strengths is its consistent financial improvement across the contract term. The net position has improved by nearly \$600,000 since FY21, and the General Fund balance has grown to more than 30% of expenditures, providing strong reserves that safeguard against unexpected financial pressures. The school has also demonstrated sound stewardship through consistent clean audit opinions and responsible debt management, including regular repayment of building loans. These practices reflect a culture of fiscal discipline that supports long-term stability.

Weaknesses

Long-term liabilities remain a key challenge. Building-related debt and pension obligations together exceed \$3 million, reducing financial flexibility and limiting the ability to redirect resources toward program expansion or facility upgrades. Additionally, special education and food service programs have continued to operate at deficits, requiring support from the General Fund. Over time, these recurring imbalances could constrain resources available for instruction and growth if not carefully monitored and addressed.

Enrollment Trends

Enrollment trends play a central role in the school's long-term financial health, as more than 90% of funding is tied to student counts. During the early years of the contract, enrollment declined due to the pandemic, with Average Daily Membership (ADM) falling to 136.7 in FY21. Since then, the school has steadily recovered, peaking at 164 showing resilience and renewed stability.

Future Enrollment Assumptions

Looking ahead, SRMCS assumes stable enrollment near capacity, projecting ADM between

160–165 in future years. The school’s Montessori program, emphasis on environmental education, and strong family engagement remain attractive to families in the community, supporting confidence in maintaining near-capacity enrollment. This stability is critical for sustaining balanced budgets and building additional financial reserves. At the same time, the school recognizes that even modest enrollment declines could significantly impact revenues and will continue to prioritize recruitment and retention efforts to mitigate this risk.

Conclusion

Overall, SRMCS’s long-term financial sustainability is strengthened by improved fund balances, reduced deficits, disciplined financial practices, and steady enrollment recovery. Weaknesses include the weight of long-term liabilities and recurring program cost pressures that require continued oversight. With stable or growing enrollment, ongoing cost management, and prudent financial planning, the school is well-positioned to maintain sustainability while continuing to invest in its mission-driven Montessori and environmental education programs.

Quality Financial Oversight

Swan River Montessori Charter School is committed to maintaining the highest standards of financial accountability and oversight. The school has established strong systems of governance and internal controls to ensure compliance with state and federal requirements, effective monitoring of public funds, and responsible stewardship of resources.

Board Oversight

The Board of Directors plays a central role in financial oversight. The Board reviews and approves the annual budget, monitors monthly financial reports, and receives regular updates from the school’s financial management team and authorizer. Annual independent audits are conducted, and the Board carefully reviews audit findings to ensure compliance with Generally Accepted Accounting Principles (GAAP) and state reporting requirements. Over the course of the current charter contract, SRMCS has consistently received unmodified (clean) audit opinions, confirming compliance and financial integrity.

Internal Controls

SRMCS maintains strong internal controls with both internal and external checks. The school contracts with an independent accounting firm to issue checks, review transactions, and prepare monthly financial statements. This external partnership ensures financial practices meet professional standards and regulatory requirements. Internally, at least two employees review all incoming and outgoing payments, providing dual accountability and reducing the risk of errors or mismanagement. Clear separation of duties, combined with Board review of financial statements, creates a system of checks and balances that safeguards public funds and minimizes opportunities for fraud.

Monitoring of Public Funds

Financial reports are prepared monthly and presented to the Board for review and discussion. These reports include budget-to-actual comparisons, cash flow analyses, and

fund balance updates, enabling real-time monitoring of fiscal health. Public funds are carefully tracked to ensure expenditures align with budgeted priorities, grant requirements, and the school's mission. Annual audits and compliance reviews by the Minnesota Department of Education (MDE) and Osprey Wilds, the school's authorizer, provide additional external verification of fiscal integrity and transparency.

Conclusion

Through strong Board involvement, professional accounting support, dual staff review of transactions, and clear separation of duties, SRMCS ensures that public funds are managed responsibly and transparently. Annual audits and compliance reviews further strengthen accountability and fraud prevention. These practices not only maintain compliance but also protect the school's financial stability, ensuring resources are directed toward supporting student learning and advancing SRMCS's mission.

Operations Performance

Board Oversight Across Key Areas

The Swan River Montessori Charter School Board of Directors provides comprehensive oversight to ensure the school fulfills its mission and maintains compliance with its charter contract, state law, and authorizer requirements. The Board exercises its role through regular meetings, review of detailed reports, approval of policies and budgets, and monitoring of both short-term and long-term goals.

Academic Oversight

The Board reviews academic performance data including MCA results, FastBridge benchmark assessments, and Montessori student growth rubrics. Progress toward charter contract goals in reading, math, science, and mission-related outcomes is reported annually and discussed in board meetings. When challenges arise such as lower-than-expected math growth, the Board has supported leadership in implementing targeted interventions, professional development, and curriculum alignment efforts. This ensures the school remains focused on improving student outcomes while preserving fidelity to Montessori philosophy.

Environmental Education Oversight

Environmental education is a statutory purpose in SRMCS's charter and a central element of the school's mission. The Board monitors progress toward environmental education performance indicators outlined in the Environmental Learning Plan (ELP), including awareness, knowledge, attitudes, skills, and action. Results from pre- and post-assessments, project-based learning activities, and community engagement projects are reviewed annually. The Board has supported investments in EE staffing, outdoor learning spaces, and partnerships with local environmental organizations to ensure that all students have access to meaningful stewardship opportunities.

Financial Oversight

The Board plays a central role in financial oversight, approving budgets, monitoring monthly financial statements, and reviewing annual audits. The school contracts with an independent accounting firm, and the Board receives regular updates to confirm compliance with Generally Accepted Accounting Principles (GAAP) and Minnesota Department of Education reporting standards. During the pandemic and subsequent enrollment fluctuations, the Board guided careful use of reserves to sustain programming. More recently, the Board has overseen the growth of the General Fund balance to over 30% of expenditures, a marker of strong fiscal stewardship. Clean audits throughout the contract term demonstrate the Board's effective oversight and commitment to transparency.

Operational and Legal Compliance Oversight

The Board ensures compliance with state and federal requirements through policy review, training, and collaboration with the school's leadership. This includes compliance with special education laws (IDEA), charter contract obligations, data practices regulations, employment law, and health and safety requirements. The Board maintains up-to-date governance practices by participating in training on charter school law and best practices. It also works closely with the school's authorizer, Osprey Wilds, and the Minnesota Department of Education to ensure accountability and transparency in all operational areas.

Conclusion

Through consistent and engaged oversight of academics, environmental education, finance, and operations—including legal compliance—the SRMCS Board of Directors ensures the school remains faithful to its mission and accountable to its stakeholders. The Board's active involvement, use of reliable data, and commitment to transparency provide a foundation for continuous improvement and long-term success.

Board-Related Successes and Challenges

The Swan River Montessori Charter School Board of Directors has experienced both notable successes and meaningful challenges during the current contract term. These experiences have strengthened the Board's understanding of its governance role and highlighted areas for continued growth.

In the area of membership and recruitment, the Board has managed transitions as five members left over the past five years, largely due to teacher turnover and time constraints among parents and community representatives. While teacher-member positions were filled in the most recent election cycle, candidate pools have been limited. The Board has successfully maintained a full roster, but cultivating a broader pool of potential candidates and volunteers remains a challenge. Increasing community engagement in governance is a clear area for focus in the next contract cycle.

With respect to training, all members have completed required charter school governance, finance, and employment law training, ensuring compliance with state mandates and

authorizer expectations. This commitment has provided Board members with the knowledge and skills to fulfill their fiduciary and oversight responsibilities effectively. Board meeting attendance has been strong, with most meetings achieving full participation. Consistent attendance has allowed the Board to deliberate with broad representation, maintain quorum with confidence, and ensure that key decisions are informed by diverse perspectives.

The Board has also initiated self-evaluation efforts, marking an important step toward continuous improvement. While still in early stages, these evaluations demonstrate the Board's willingness to reflect on its effectiveness, identify strengths, and address areas where governance practices can be strengthened.

In terms of board-level projects, the Board has provided leadership on several key initiatives. Most notably, it supported the adoption and implementation of the Science of Reading as a school-wide priority. By allocating funding for training and instructional materials, the Board demonstrated its commitment to aligning financial resources with academic priorities. Additionally, the Board has overseen improvements to the staff evaluation system, ensuring compliance with state requirements while making the process more meaningful for teacher development. The Board also plays a structured role in evaluating school leadership. Each year, members oversee a multi-step evaluation of the School Director, incorporating staff input, the Director's self-assessment, and Board analysis. This process concludes with goal setting for the coming year, ensuring accountability, professional growth, and alignment with the school's mission.

In summary, the Board has been successful in maintaining training compliance, sustaining strong attendance, launching self-evaluation, and supporting significant instructional and operational initiatives. At the same time, challenges in recruiting a wider range of candidates and engaging in the broader community in governance remain areas for development. These experiences, combined with the Board's ongoing oversight of academics, environmental education, finance, and operations, reflect a governing body that is both committed to accountability and continually seeking to strengthen its effectiveness.

Board Process for Evaluating School Leadership

The Swan River Montessori Charter School Board of Directors follows a structured, annual process to evaluate the performance of the School Director, ensuring accountability, professional growth, and alignment with the school's mission and charter contract.

The process begins each February, when the Board reviews evaluation forms and procedures, making any revisions as necessary. At this stage, the Board and the School Director also meet to review the process and address any questions or concerns.

In March, staff members are provided with the School Director's job description and performance evaluation form to complete. At the same time, the Director conducts a self-evaluation. By late March, all completed staff input and the Director's self-assessment are collected and compiled into a single comprehensive document.

During April, Board members review and analyze the compiled evaluations. They prepare a confidential written summary that reflects staff feedback, incorporates the Director's self-reflection, and identifies both strengths and areas for growth. The document also includes proposed leadership goals for the coming year.

In May, the Board meets with the School Director in a closed session to review the evaluation. At this meeting, the Board shares the compiled summary, discusses progress and challenges, and collaborates with the Director to finalize goals. Once consensus is reached, both the Board and the Director sign and date the finalized evaluation, which is filed in the Director's personnel record.

Between June and January, the Board monitors progress toward the agreed-upon goals, revisiting them during meetings as needed. This ensures the evaluation process is not a one-time exercise, but a continuous improvement tool guiding leadership accountability and development throughout the year.

This structured cycle demonstrates the Board's commitment to providing effective oversight, incorporating multiple perspectives, and aligning leadership evaluation with the mission of educating the whole child through Montessori and environmental education. It also ensures that the School Director is supported with clear expectations, constructive feedback, and measurable goals that strengthen both leadership effectiveness and school performance.

Management and Operations: Successes and Challenges

During the current charter contract term, SRMCS has experienced both successes and challenges in management and operations, demonstrating resilience and a strong commitment to continuous improvement.

School Leadership

A major success has been leadership stability. The Director is now in her fifth year, providing consistent vision, continuity, and a steady hand in guiding both academics and operations. This stability, along with low turnover among Montessori-certified lead teachers, has supported a positive school culture and reliable instructional leadership.

Day-to-Day Operations

Transportation services have remained reliable, supported through local district busing, which minimizes costs while ensuring access for families.

Facilities are well maintained, offering a safe and welcoming environment for students and staff.

- Food service, however, has presented ongoing challenges. While Minnesota's universal free meals policy has been beneficial for families, it has also increased waste and created inconsistencies in participation. These changes have contributed to an annual food service deficit of about \$10,000, requiring support from the General Fund.

- Staffing has been a relative strength. Following some turnover in the early years of this contract, staffing has stabilized, particularly among lead teachers. Support staff turnover averages about 25%, largely due to family or relocation factors outside of the school's control. The school has invested heavily in professional development, with staff completing training in Positive Discipline, Science of Reading (LETRS and Careiall programs), and Montessori curriculum alignment. A redesigned staff evaluation process now aligns with state requirements, offering a more meaningful tool for professional growth, though the transition has been challenging.
- Health and safety, the COVID-19 pandemic posed significant obstacles, but SRMCS responded by prioritizing staff and family well-being while maintaining continuity of learning. The school contracted with Kinswood Security to conduct a vulnerability assessment and has begun implementing prioritized recommendations. In December 2024, the Director attended the *I Love U Guys* training, further strengthening crisis response protocols. The school continues to refine safety systems in collaboration with local law enforcement
- Community connection remains one of SRMCS's hallmarks. Parent nights showcase Montessori lessons and student research, while Arts Night celebrates student creativity. PTO-supported events such as the orchard outing, school dance, and Breakfast with the Bunny reinforce family-school partnerships and celebrate the diversity of the school community. These events have strengthened trust and engagement among families, staff, and students.

Compliance

SRMCS has consistently maintained compliance with all state and federal reporting requirements and has successfully met expectations in Minnesota Department of Education (MDE) compliance reviews. This reflects the school's commitment to accountability and strong operational practices.

Conclusion

Overall, SRMCS's management and operations reflect a balance of stability and innovation. Leadership continuity, strong professional development, robust safety planning, and meaningful community engagement represent major successes. At the same time, food service funding and the transition to a more rigorous staff evaluation system have posed challenges. Together, these experiences demonstrate the school's ability to adapt, improve, and remain committed to excellence in governance, operations, and service to students and families.

Student and Parent Satisfaction

Family and Student Feedback: Process, Data, and Use for Improvement

Swan River actively seeks input from families and students to ensure that the school is meeting their needs and to guide ongoing improvement. Formal surveys are administered twice each year, once in the fall and once in the spring, providing opportunities for families to share their perspectives on academics, communication, culture, and overall satisfaction with the school.

The Family Satisfaction Survey included questions on parent satisfaction with academic instruction, communication from teachers and administration, school climate, safety, and opportunities for family involvement. Families were also given open-response sections to provide more detailed feedback on strengths and areas for growth.

According to the results, families expressed strong satisfaction with the Montessori environment, the dedication of staff, and the school's emphasis on community engagement. Areas identified for improvement included communication consistency across classrooms and continued development of extracurricular opportunities.

By conducting surveys in both the fall and spring, the school is able to track changes in satisfaction over time and respond more quickly to emerging concerns. The fall survey provides early feedback that can be acted upon during the school year, while the spring survey helps the school assess overall effectiveness and set goals for the following year.

The school leadership and Board review survey results, discuss patterns in the data, and use the information to inform decision-making. For example, recent survey feedback has contributed to strengthening family communication strategies, refining health and safety practices, and identifying professional development priorities for staff. Open-ended comments are carefully considered, as they often provide context and suggestions that guide practical improvements.

In summary, Swan River's use of twice-yearly family surveys creates an ongoing feedback loop between families and school leadership. This process ensures that parent and student voices are heard, valued, and translated into meaningful action, supporting the school's commitment to continuous improvement and responsiveness to its community.

PART B: FUTURE STRATEGIC DIRECTION

Significant Program Changes Under Consideration

Swan River Montessori Charter School (SRMCS) remains committed to its mission of educating the whole child—heart, mind, and soul—through authentic Montessori instruction and environmental education. While the mission, vision, and statutory purposes will not change under the potential new contract, the school is considering a significant restructuring of its classroom configuration to better serve students and strengthen long-term sustainability.

Currently, SRMCS offers a preschool program alongside two Children's House classrooms serving ages 3–6. Under the new contract term, the school is exploring eliminating the preschool program and instead expanding to three Children's House classrooms that would exclusively serve Kindergarten and 1st grade students. This would create a more focused early elementary program while meeting consistent demand for Kindergarten enrollment.

The Elementary I program would remain at three classrooms, but each would now serve only 2nd and 3rd grade students. This adjustment would preserve the integrity of

Montessori's multi-age model while providing a more balanced distribution of students across grade levels.

The Elementary II program would continue in its current structure with two classrooms serving 4th–6th grade students, maintaining continuity and depth for upper elementary learners.

This reconfiguration offers several key benefits:

- **Mission Alignment:** By concentrating Children's House on Kindergarten and 1st grade, SRMCS strengthens its ability to deliver developmentally aligned Montessori education to younger learners, building independence and foundational academic skills in a structured environment.
- **Instructional Continuity:** Adjusting Elementary I to focus on 2nd–3rd graders allows for smoother academic progression, while Elementary II remains unchanged to support leadership development, social responsibility, and advanced academic work.
- **Enrollment Growth and Financial Sustainability:** Moving to three Children's House classrooms increases the school's capacity by approximately 30 students. This growth would raise ADM, helping the school meet projected expenses, maintain a healthy fund balance, and continue investing in program quality.
- **Community Impact:** Expanding Kindergarten and early elementary access provides more families the opportunity to begin their educational journey at SRMCS, strengthening continuity through 6th grade and enhancing long-term family engagement.

Conclusion

The proposed shift to three Children's House classrooms (Kindergarten–1st grade), three Elementary I classrooms (2nd–3rd grade), and two Elementary II classrooms (4th–6th grade) reflects a thoughtful program change designed to strengthen mission delivery and long-term financial health. This restructuring would expand access for early elementary students, ensure continuity through the Montessori planes of development, and position SRMCS to sustain and grow its high-quality programs in the years ahead.

Enrollment, Growth, and Relocation Plans

SRMCS is committed to thoughtful, mission-driven growth during the next contract term. While the school does not currently plan to relocate to a new site, it does anticipate programmatic adjustments and enrollment growth that will strengthen both academic outcomes and long-term financial sustainability.

Enrollment Projections and Demographics

SRMCS expects enrollment to remain near capacity, with Average Daily Membership (ADM) projected at 160–165 students. Enrollment demand for Kindergarten and lower elementary grades continues to be strong, with waitlists in certain years. The school's demographics are expected to remain relatively stable, with a balance of students from the immediate

community and surrounding areas. SRMCS continues to welcome a diverse mix of families who are drawn to the school's Montessori philosophy and environmental education focus.

Plans for Grade-Level Expansion

The most significant change under consideration is a reconfiguration of grade levels served within the existing facility. SRMCS plans to phase out its preschool program and instead operate three Children's House classrooms serving Kindergarten and 1st grade students only. The Elementary I program would shift to three classrooms serving exclusively 2nd and 3rd grade students, while the Elementary II program would continue with two classrooms serving 4th–6th grade students. This adjustment would increase enrollment capacity by approximately 30 students, allowing the school to maintain balanced classrooms and better support developmental needs across the Montessori planes of learning.

Plans for Additional Programs

At this time, SRMCS does not anticipate adding new programs such as formal out-of-school time offerings. However, the school will continue to support family engagement activities and enrichment opportunities through partnerships with the PTO and community organizations. These include evening Montessori showcases, arts programming, and environmental stewardship projects, which complement the core instructional program and deepen student learning.

Plans for Relocation

The school does not anticipate moving to a new site during the upcoming contract term. Current facilities are well maintained, meet the needs of students and staff, and provide safe, functional spaces for Montessori classrooms, environmental education projects, and community engagement events. Instead, the focus will remain on maximizing the existing site through efficient use of space and continued facility maintenance.

Conclusion

Through these enrollment and program adjustments, SRMCS will increase capacity, strengthen continuity across grade levels, and ensure long-term financial sustainability, all while remaining firmly grounded in its Montessori mission and environmental education vision. The proposed changes will allow more families to access the school's unique educational model and ensure that SRMCS continues to thrive as a stable, mission-driven public charter school.

Capacity of the Board of Directors and School Leadership

Swan River Montessori Charter School (SRMCS) is guided by a Board of Directors and leadership team that collectively bring the skills, experience, and dedication necessary to advance the school's mission of educating the whole child—heart, mind, and soul—through authentic Montessori instruction and environmental education. Together, these leaders provide strong governance, fiscal oversight, instructional expertise, and organizational management, ensuring that SRMCS remains faithful to its mission and vision while maintaining compliance and accountability.

Board Governance

The Board of Directors demonstrates strong governance capacity through consistent meeting attendance, compliance with training requirements, and active participation in school oversight. Members represent a mix of parent, teacher, and community stakeholders, ensuring broad perspectives in decision-making. The Board conducts annual self-evaluations and participates in professional development to strengthen its effectiveness, reflecting a commitment to continuous improvement.

Fiscal Management

The Board and leadership team have successfully guided SRMCS through both challenges and successes in financial management. They oversee an annual budget of nearly \$3 million, monitor monthly financial reports, and ensure compliance with Generally Accepted Accounting Principles (GAAP). The school contracts with an external accounting firm for financial services, while internal staff ensure dual-review of transactions. Annual independent audits have resulted in clean opinions, reflecting strong fiscal discipline and stewardship of public funds. The Board's demonstrated ability to reduce accumulated deficits and build a healthy fund balance further highlights its capacity in this area.

Education, Curriculum, and Instruction

School leadership includes Montessori-certified teachers, state-licensed educators, and an experienced Director. The Director has overseen the integration of state academic standards with Montessori curriculum, ensuring both fidelity to Montessori philosophy and compliance with Minnesota accountability requirements. The leadership team has guided professional development in key instructional priorities, including the Science of Reading, Positive Discipline, and curriculum alignment, equipping teachers with evidence-based strategies to support student growth.

School and Non-Profit Management

The Director and Board have demonstrated strong organizational management through effective staffing, compliance, and community engagement practices. Staffing stability among Montessori-certified lead teachers has supported instructional consistency, while operational challenges such as food service deficits and safety planning have been met with proactive solutions. The Board has maintained compliance with all state and federal reporting requirements, as well as Minnesota Department of Education (MDE) reviews, demonstrating organizational accountability comparable to other successful non-profits.

Conclusion

The combined capacity of the SRMCS Board of Directors and school leadership ensures that the school is well-positioned to continue fulfilling its mission and vision. With demonstrated strengths in governance, fiscal management, education and curriculum, and organizational leadership, SRMCS has the structures and expertise in place to sustain its success and guide the school confidently into the next charter contract term.

Plans for Governance Changes

Swan River Montessori Charter School (SRMCS) does not anticipate any changes to its governance structure during the term of the potential new contract. The Board will

continue to operate with its current size, composition, and structure, maintaining a balance of parent, teacher, and community members in accordance with Minnesota statute and the school's bylaws.

The Board remains committed to its development goals of ongoing training, self-evaluation, and strengthening recruitment efforts to ensure broad community representation. These initiatives are designed to enhance effectiveness rather than alter the fundamental structure of governance.

In summary, SRMCS does not plan to increase or reduce the number of Board members, nor to change the balance of representation (e.g., teacher majority). The current governance framework has proven effective in providing oversight of academics, environmental education, finance, and operations, and will continue to guide the school in fulfilling its mission and vision during the next charter term.

Plans for Management Changes

Swan River Montessori Charter School (SRMCS) does not anticipate any changes to management during the term of the potential new contract. The school's leadership team, including the Director and Montessori-certified lead teachers, will remain in place, providing continuity and stability in instructional leadership and day-to-day operations.

There are no expected changes in key leaders, no planned adjustments to the management structure, and no significant changes in leadership responsibilities. The current management framework has proven effective in supporting the school's mission, overseeing academics and operations, and ensuring compliance with state and federal requirements.

By maintaining stability in school leadership and management, SRMCS will continue to focus on delivering high-quality Montessori and environmental education while supporting staff, students, and families.

Potential Challenges and Plans for Remedies

As SRMCS looks ahead to the next contract term, the school recognizes that even with strong academic, financial, and operational performance, several potential challenges may arise. The school is committed to addressing these challenges proactively to ensure continued success and alignment with its mission.

Enrollment Stability

As a small school, SRMCS's financial health is closely tied to maintaining near-capacity enrollment. While demand for Montessori programming remains strong, even modest declines in Average Daily Membership (ADM) can significantly impact revenue.

Plan to Remedy: SRMCS will strengthen student recruitment and retention strategies, including outreach to new families, expanded community engagement, and clear communication of program offerings. The planned reconfiguration to expand Children's House and Kindergarten/early elementary enrollment will also support stable ADM and long-term sustainability.

Mathematics Growth

While reading and science outcomes have consistently met or exceeded expectations, math growth has lagged behind state benchmarks in some years.

Plan to Remedy: The school will continue to invest in professional development focused on structured math instruction, expand use of Montessori math materials alongside supplemental evidence-based resources, and use FastBridge data for targeted interventions and progress monitoring.

Food Service Deficits

Food service has regularly operated at a deficit due to participation inconsistencies and limited catering options in the area.

Plan to Remedy: The Board and leadership team will address food service deficits by exploring less expensive contract food service providers and reducing staff assigned to food service operations. These steps will help control costs while maintaining compliance with state policy requirements.

Long-Term Liabilities

Debt obligations from building loans and pension liabilities remain significant and limit financial flexibility.

Plan to Remedy: SRMCS will continue to build reserves, manage debt through timely repayment, and maintain strong fund balances to ensure that long-term liabilities do not affect instructional quality or operational stability.

Staffing and Professional Development

Although leadership and teacher stability have been strengths, support staff turnover has averaged around 25%, and ongoing training demands can place pressure on limited resources.

Plan to Remedy: SRMCS will continue prioritizing professional development for teachers, strengthening mentoring supports for new staff, and offering retention-focused initiatives to maintain a stable workforce aligned with Montessori values.

Conclusion

By anticipating these challenges—enrollment fluctuations, math growth, food service deficits, long-term liabilities, and staffing pressures—SRMCS is well-prepared to respond with targeted strategies. These proactive plans will help ensure that the school continues to fulfill its mission of educating the whole child while maintaining strong academic, operational, and financial performance throughout the next contract term.

Plans to Strengthen Environmental Education

Swan River Montessori Charter School (SRMCS) will strengthen its environmental education program during the next contract term by deepening curriculum integration and

expanding project-based learning. Environmental themes will be embedded more intentionally into Montessori lessons, and students will engage in hands-on projects such as school gardens, composting, and conservation activities that build both knowledge and stewardship.

Teachers will receive ongoing training to support consistent, high-quality environmental instruction, and progress will be measured through the Environmental Learning Plan to ensure growth in awareness, knowledge, attitudes, skills, and action. These efforts will increase students' environmental literacy and advance SRMCS's mission of educating the whole child through a nature-connected approach.

PART C: PROPOSED PERFORMANCE OUTCOMES

Proposed Outcomes — Academic / Academic-Related

Below are suggested targets for SRMCS, aligned with the eleven Osprey Wilds academic indicators, to promote both high performance and continuous improvement:

Indicator	Proposed Target / Goal
Indicator 1: Mission-Related Outcomes	All students (and defined subgroups) will show year-over-year progress on the Montessori Planes of Development rubrics (normalization, independence, social/emotional wellbeing, community engagement), targeting at least 85% of students improving each year.
Indicator 2: ELL Progress	English Learner students will meet or exceed expected growth toward English language proficiency, as measured by state or district-approved assessments, with at least 50% growth per year.
Indicator 3: Reading Growth	All students (and subgroups) will meet or exceed expected year-over-year growth in reading as measured by FastBridge benchmarks, aiming for at least 50 <i>percentile growth</i> per year.
Indicator 4: Math Growth	All students (and subgroups) will meet or exceed expected year-over-year growth in reading as measured by FastBridge benchmarks, aiming for at least 50 <i>percentile growth</i> per year.
Indicator 5: Reading Proficiency	At least 85% of students (and subgroups) will achieve grade-level proficiency in reading (via state assessment or comparable measure) by year end.
Indicator 6: Math Proficiency	At least 75% of students (and subgroups) will achieve grade-level proficiency in math by year end.
Indicator 7: Science Proficiency and Growth	Students in grade 5 will meet or exceed state proficiency averages on the MCA Science assessment each year of the contract term. The school will also aim for at least 60% of students to demonstrate proficiency by the end of the contract term, with all student subgroups making progress toward closing proficiency gaps.

Indicator	Proposed Target / Goal
Indicator 8: Other Curricular Areas / Educational Programs	Maintain or increase student proficiency and growth in areas like writing across genres, cultural studies, and research projects; for example, aim for 85% improvement in student writing portfolios.
Indicator 9: Postsecondary Readiness	N/A
Indicator 10: Attendance	Sustain high attendance rates, targeting at least 92% daily attendance with continued reduction of chronic absenteeism.
Indicator 11: Retention / Enrollment Stability	Maintain or increase student retention year over year; aim to retain at least 85% of students each year and minimize mid-year attrition.

SRMCS Approach to Implementing and Evaluating EE Indicators 1–5

Indicator 1: Awareness

SRMCS develops awareness by engaging students in age-appropriate lessons on ecological systems and human impact. For example, Children’s House students learn about recycling and composting, while Elementary I and II students study native Minnesota birds and their role in ecosystems. Awareness is measured through curriculum-based assessments, such as sorting recyclable items or completing a bird-matching worksheet, with targets of 75–80% proficiency.

Indicator 2: Knowledge

Students build ecological knowledge by studying human and natural systems. Elementary I and II students learn about invasive species, their impact on local ecosystems, and how humans influence their spread. Knowledge is assessed through exit tickets and group presentations, with goals of 75–80% mastery on rubrics that measure content accuracy and understanding.

Indicator 3: Attitudes

To cultivate positive attitudes toward the environment, SRMCS emphasizes themes such as biodiversity and water pollution. Elementary I students create posters on reducing water pollution, while Elementary II students design biodiversity posters to highlight ecosystem health. These activities are evaluated using rubrics that assess both content and expression of stewardship values, aiming for 75% of students to demonstrate positive environmental attitudes.

Indicator 4: Skills

Students develop problem-solving and critical-thinking skills by investigating weather, climate, and climate change. Elementary I students complete daily weather journals, while Elementary II students create art pieces explaining extreme weather. Skills are measured through completed assignments and rubric-based assessments, targeting 75–80% of students demonstrating accurate application of concepts.

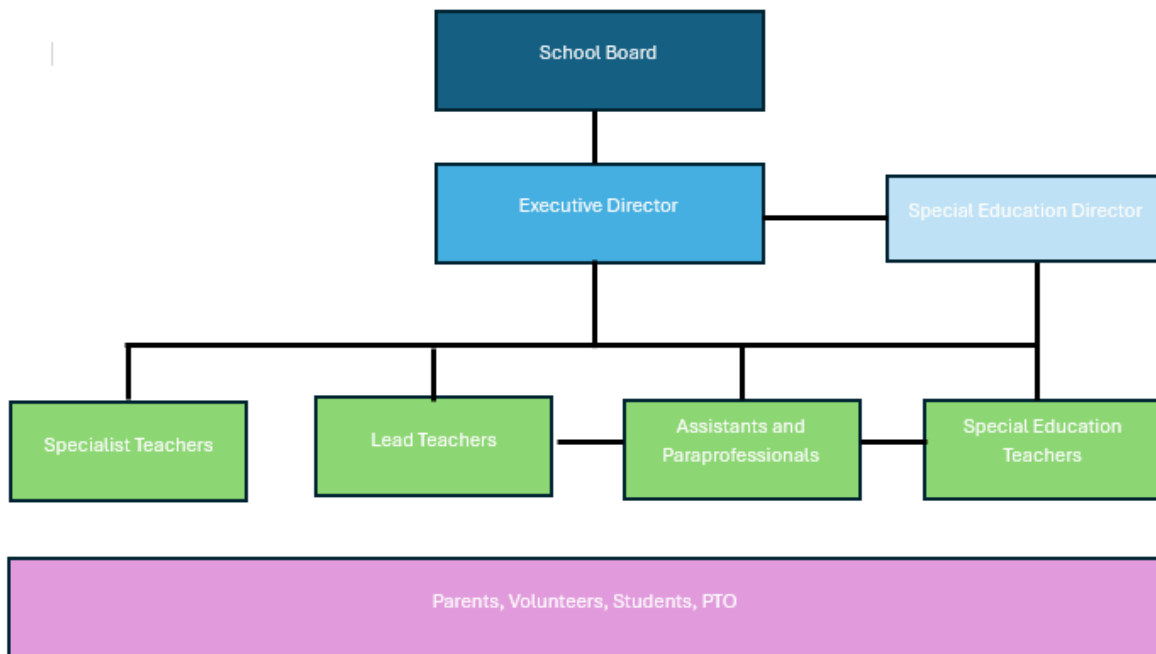
Indicator 5: Action

SRMCS empowers students to translate awareness, knowledge, and skills into action. Children's House students build bird feeders and explain why birds are essential to ecosystems, while Elementary II students study deforestation, plant seeds, and record impacts of tree loss. Actions are evaluated through project completion and exit tickets, with 75–80% of students expected to demonstrate understanding and engage in sustainable practices.

Conclusion

Through carefully designed, developmentally appropriate strategies and clear evaluation methods, SRMCS ensures that students progress through all five stages of environmental literacy: awareness, knowledge, attitudes, skills, and action. The use of curriculum-based measures, rubrics, and hands-on projects provides accountability and evidence of growth, directly supporting Osprey Wilds' EE Performance Evaluation Framework while advancing the school's mission to educate the whole child through a nature-connected approach.

Organizational Chart



Four Year Financial Plan

SWAN RIVER MONTESSORI CHARTER SCHOOL FY26 BUDGET 4 YEAR PROJECTION
SCHOOL BOARD APPROVAL 5/20/2025

9/10/2025



	FY26	FY27	FY28	FY29	FY30
Enrollment					
Full Day K	27	25	27	27	27
1	25	25	24	24	24
2	27	27	26	26	26
3	26	26	26	26	26
4	26	26	26	26	26
5	26	26	26	26	26
6	8	10	10	10	10
Total ADM	165	165	165	165	165
Total Pupil Unit	165	165	165	165	165
REVENUES					
State Aid					
General Aid	\$1,292,881	\$1,317,566	\$1,342,745	\$1,368,427	\$1,403,380
Compensatory	49,171	49,171	49,171	49,171	49,171
Lease Aid	157,120	157,120	157,120	157,120	157,120
Special Ed	731,483	756,954	786,163	812,970	840,890
Literacy Incentive Aid	17,793	17,793	17,793	17,793	17,793
Hourly Worker Unemployment	37,574	37,574	37,574	37,574	37,574
School Library Aid - Charter	20,000	20,000	20,000	20,000	20,000
Student Support - Charter	20,000	20,000	20,000	20,000	20,000
Total State Aid	2,326,022	2,376,178	2,430,566	2,483,055	2,545,928
Federal Aid					
Title I	\$24,114	\$21,850	\$22,462	\$22,911	\$23,370
Special Ed	124	127	128	129	131
Federal Special Education Aid	22,132	22,628	22,854	23,082	23,313

SWAN RIVER MONTESSORI CHARTER SCHOOL FY26 BUDGET 4 YEAR PROJECTION
SCHOOL BOARD APPROVAL 5/20/2025

9/10/2025

	FY26	FY27	FY28	FY29	FY30
Community Service Revenue					
Before/After School Care - Extended Care	\$40,800	\$41,208	\$41,620	\$42,036	\$42,457
Preschool Tuition - Children's House	84,825	85,673	86,530	87,395	88,269
Community Service Revenue	125,625	126,881	128,150	129,432	130,726
TOTAL REVENUE - SCHOOLWIDE	\$2,652,884	\$2,703,941	\$2,761,811	\$2,817,648	\$2,883,907

EXPENSES

Administration & Operations

100 Salaries	\$119,397	\$121,785	\$124,221	\$126,705	\$129,240
200 Benefits	31,869	34,131	36,555	39,150	41,930
Add: Family Leave 1/1/2026	4,718	9,625	9,818	10,014	10,214
305 Contracted Services	158,500	166,425	174,746	183,484	192,658
320 Communication	5,971	6,090	6,212	6,336	6,463
329 Postage	896	914	932	951	970
330 Utilities	39,182	41,141	43,198	45,358	47,626
340 Insurance	25,632	26,913	28,259	29,672	31,155
350 Repairs & Maintenance	2,081	2,122	2,165	2,208	2,252
366 Professional Development	5,202	5,306	5,412	5,520	5,631
370 Building Lease	174,578	174,578	174,578	174,578	174,578
401 General Supplies	23,881	24,359	24,846	25,343	25,850
405/406 Software	520	531	541	552	563
490 Food	416	424	433	442	450
820 Dues & Membership	21,995	23,095	24,249	25,462	26,735
920 Fund Balance Transfer	13,741	14,428	15,149	15,907	16,702
Total Administration & Operations	\$628,578	\$651,868	\$671,314	\$691,681	\$713,016

Instructional

100 Salaries	\$574,436	\$587,325	\$599,072	\$611,053	\$623,274
200 Benefits	\$152,319	\$158,578	\$167,740	\$171,095	\$174,517
305 Contracted Services	\$0	\$0	\$0	\$0	\$0
360 Transportation - Field Trips & Registration	\$13,183	\$13,842	\$14,534	\$15,260	\$16,024
366 Travel & Conferences	\$6,615	\$6,946	\$7,293	\$7,658	\$8,041
401 General Supplies	\$14,646	\$15,378	\$16,147	\$16,954	\$17,802
430 Instructional Supplies	\$31,244	\$32,806	\$34,446	\$36,169	\$37,977
461 Standardized Tests	\$2,756	\$2,894	\$3,039	\$3,191	\$3,350
820 Dues & Membership	\$1,158	\$1,216	\$1,276	\$1,340	\$1,407
Total Instructional	\$796,355	\$818,984	\$843,547	\$862,720	\$882,391

Title I Programs

100 Salaries	\$18,240	\$17,204	\$17,548	\$17,899	\$18,257
200 Benefits	5,874	4,645	4,914	5,012	5,112
Total Title Programs	\$24,114	\$21,850	\$22,462	\$22,911	\$23,370

SWAN RIVER MONTESSORI CHARTER SCHOOL FY26 BUDGET 4 YEAR PROJECTION
SCHOOL BOARD APPROVAL 5/20/2025

9/10/2025

	FY26	FY27	FY28	FY29	FY30
Special Education - State					
100 Salaries	\$354,753	\$384,660	\$392,353	\$400,200	\$408,204
200 Benefits	96,710	103,858	109,859	112,056	114,297
305 Contracted Services	7,525	7,901	8,296	8,711	9,146
366 Travel & Conferences	1,186	1,246	1,308	1,373	1,442
394 Payments to Other Agencies	332,487	349,112	366,567	384,895	404,140
401 General Supplies	4,829	5,070	5,324	5,590	5,870
405 Purchased Software	1,984	2,281	2,624	3,017	3,470
433 Instructional Supplies	9,104	9,560	10,038	10,540	11,067
Total Special Education - State	\$808,578	\$863,688	\$896,368	\$926,383	\$957,636
Special Education - Federal					
100 Salaries	\$22,365	\$22,866	\$23,094	\$23,326	\$23,559
200 Benefits	3,947	4,035	4,076	4,116	4,157
Total Special Education - Federal	\$26,312	\$26,901	\$27,170	\$27,442	\$27,716
Total General Fund	\$2,283,938	\$2,383,290	\$2,460,861	\$2,531,137	\$2,604,129
Food Service Fund					
490 Food	131,911	138,564	145,558	152,912	160,646
Total Food Service Fund	\$131,911	\$138,564	\$145,558	\$152,912	\$160,646
Community Service Fund					
100 Salaries	\$87,340	\$89,086	\$90,868	\$92,685	\$94,539
200 Benefits	21,202	21,414	21,628	21,844	22,063
394 Field Trips	243	255	268	281	295
401 Supplies	1,489	1,563	1,641	1,723	1,810
820 Dues & Membership	243	280	322	370	426
Total Community Service Fund	\$110,517	\$112,599	\$114,727	\$116,905	\$119,133
TOTAL EXPENSES - SCHOOLWIDE	\$2,526,366	\$2,634,453	\$2,721,147	\$2,800,954	\$2,883,907
ANNUAL SURPLUS/(DEFICIT)	\$126,518	\$69,488	\$40,663	\$16,694	\$0
CUMULATIVE FUND BALANCE	\$868,601	\$938,089	\$978,752	\$995,446	\$995,446
FUND BALANCE %	34%	36%	36%	36%	35%

Academic Data

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	12.3	16	
Aggregate	12.5	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	10	50	20.0%
Aggregate	31	175	17.7%

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	54495	292110	18.7%
Aggregate	210609	1111202	19.0%

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	13	50	26.0%
Aggregate	48	175	27.4%

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	115321	292110	39.5%
Aggregate	432175	1111202	38.9%

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	107	48.6%
Aggregate	525	45.9%

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	48	107	44.9%
Aggregate	232	525	44.2%

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	52	51.8%
Aggregate	253	50.0%

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	28	52	53.8%
Aggregate	130	253	51.4%

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	4	50	8.0%
Aggregate	10	176	5.7%

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	39986	290542	13.8%
Aggregate	167096	1103989	15.1%

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	31	50	62.0%
Aggregate	113	177	63.8%

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	128231	290842	44.1%
Aggregate	474169	1104289	42.9%

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	107	47.8%
Aggregate	522	39.9%

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	48	107	44.9%
Aggregate	178	522	34.1%

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	25	55	45.5%
Aggregate	103	197	52.3%

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	55	43.9%
Aggregate	252	48.5%

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	25	55	45.5%
Aggregate	94	202	46.5%

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	3	11	3	5	22	
Aggregate	17	51	22	20	110	71.8

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	6,110	22,955	10,924	23,604	63,593	
Aggregate	31,389	108,584	48,068	106,047	294,088	55.8

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	22	121	42	94	279	
Aggregate	129	602	235	408	1,374	61.8

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	9	22	15	5	51	
Aggregate	29	111	51	26	217	76.3

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
FY25	28,409	69,409	37,428	50,876	186,122	
Aggregate	137,634	338,085	180,561	223,814	880,094	64.3

Monticello Public (ISD 882)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY21*	139	385	160	147	831	72.7
FY22	149	423	163	117	852	76.7
FY23	131	356	162	136	785	72.4
FY24	141	395	150	147	833	73.3
FY25	148	356	193	149	846	
Aggregate	708	1,915	828	696	4,147	73.2

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
FY21*	2	6	3	2	13	73.1
FY22	1	4	2	4	11	54.5
FY23	2	5	1	5	13	57.7
FY24	1	8	4	1	14	78.6
FY25	2	6	3	0	11	
Aggregate	8	29	13	12	62	70.2

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
FY21*	2,242	7,071	5,602	19,011	33,926	35.7
FY22	3,099	8,978	6,903	22,288	41,268	37.6
FY23	2,844	8,626	6,378	23,129	40,977	35.8
FY24	3,037	9,015	7,018	24,594	43,664	35.6
FY25	2,431	6,789	5,728	19,014	33,962	
Aggregate	13,653	40,479	31,629	108,036	193,797	36.1

Monticello Public (ISD 882)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY21*	6	44	18	79	147	40.1
FY22	13	47	37	78	175	44.9
FY23	12	38	26	86	162	38.9
FY24	15	34	31	103	183	35.2
FY25	11	30	30	71	142	
Aggregate	57	193	142	417	809	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
FY21*	10	10	19	6	45	65.6
FY22	9	18	14	18	59	57.6
FY23	10	24	19	26	79	55.1
FY24	5	34	18	20	77	62.3
FY25	9	23	27	16	75	
Aggregate	43	109	97	86	335	59.9

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
FY21*	34,558	64,678	46,165	64,122	209,523	58.4
FY22	43,786	74,465	49,130	68,856	236,237	60.5
FY23	44,997	74,269	48,973	67,215	235,454	61.1
FY24	46,271	75,632	50,466	67,952	240,321	61.2
FY25	34,619	92,364	47,752	74,480	249,115	
Aggregate	204,131	381,408	242,486	342,625	1,170,650	60.4

Monticello Public (ISD 882)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY21*	240	391	235	221	1,087	68.9
FY22	274	449	193	187	1,103	74.3
FY23	259	401	223	188	1,070	72.0
FY24	238	425	238	209	1,110	70.5
FY25	108	378	167	194	867	
Aggregate	1,118	2,044	1,076	999	5,237	70.7

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
FY21*	4	2	5	1	12	70.8
FY22	0	2	1	8	11	22.7
FY23	0	4	2	9	15	33.3
FY24	0	6	2	5	13	53.8
FY25	1	4	3	5	13	
Aggregate	5	18	13	28	64	46.1

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency
FY21*	2,638	6,438	5,788	18,862	33,726	35.5
FY22	3,742	8,674	7,192	21,587	41,195	38.9
FY23	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	3,033	3,429	7,204	26,543	40,209	
Aggregate	17,527	35,798	34,979	111,506	199,810	35.4

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	14	33	35	95	177	
Aggregate	84	198	146	414	842	42.2

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	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	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	13	11	84.6%
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	120	96	50	99	82.5%
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	128	136	94.1%
FY25			
Average	328	395	83%

Data Source: Data provided to OW by school

**Consistent attendance rate not reported by the state