RMCS

Swan River Montessori Charter School



Swan River Montessori Charter School #4137-07
Comprehensive Achievement and Civic Readiness Report
2025- 2026

Board Approved on October 19, 2026

Table of Contents

Section: **Page Number:**

School Information..... 5
Contact Information..... 5
Grades/Ages Served..... 5
Year Opened..... 5
Mission..... 5
Vision..... 6
Authorizer Information..... 6
SRMCS and OW: A Brief History..... 6
Purpose of the Annual Report..... 7
Implementation of Primary &..... 7
Additional Statutory Purposes..... 7
Student Enrollment & Demographics..... 9
Number of Students Enrolled..... 9
Key Demographic Trends..... 10
Student Attendance, Attrition & Mobility..... 10
Attendance..... 10
Attrition..... 11
Student Mobility..... 12
Educational Approach and Curriculum..... 12
Our Approach to Education..... 12
School Goals & Benchmarks for Instruction and Student Achievement..... 13
Alignment to State Standards..... 13
Remediation & Acceleration Practices..... 14
Special Education..... 14
English Learner Program..... 14
Early Childhood Program..... 15
Extended Care & Essential Care Programs..... 16
Enrichment/Extra-Curricular Programs..... 16
School Staff & Our Educational Mission..... 16
School Calendar & Daily Schedule..... 17
Innovative Practices and Implementation..... 17
Academic Performance: Goals & Benchmarks..... 18
Progress on OW Contractual, Academic & CARC Alignment..... 18
Indicator 1: Mission-Related Outcomes..... 19
Indicator 2: English Language Learners..... 20

Indicator 3: Reading Growth....20
Indicator 4: Math Growth....21
Indicator 5: Reading Proficiency....23
Indicator 6: Math Proficiency....24
Indicator 7: Science Proficiency & Growth....25
Indicator 8: Proficiency/Growth in Other Curricular Areas or Educational Programs:....26
Indicator 9: Post-Secondary Readiness....27
Indicator 10: Engagement....28
Federal & State Accountability:....28
Additional Comprehensive Achievement and Civic Readiness....29
Assessing Student Progress and Instructional Strengths....29
Assessment of Student Progress....29
Data Disaggregation and Educational Effectiveness....29
Equitable Student Outcomes and Achievement Gap Closure....30
Gifted and Talented Identification and Accelerated Instruction....31
Evaluation of Instructional Strengths and Areas for Improvement....31
Evaluation of Curriculum Strengths and Weaknesses....32
Civic Readiness and Whole-Child Development....32
Curriculum and Instruction Review System....32
Strategies and Instructional Best Practices....33
Student Outcomes and Curriculum Effectiveness....33
Equitable Access to Effective Teachers....35
Teacher Evaluation and Professional Growth....35
Continuous Curriculum Review and Improvement....36
Improvement of Instructional Practices....37
Response to Intervention and Targeted Academic Support....37
FY2025–26 Intervention Outcomes....38
Using Intervention Outcomes to Improve Instruction....38
Student Achievement and Instructional Effectiveness....39
English Language Development....39
Improving Academic Achievement of English Learners....39
Long-Term Strategic Improvement....40
Equitable Teacher Distribution & Access to Diverse Teachers....40
Process for Examining Equitable Teacher Distribution....41
Access to Racially and Ethnically Diverse Teachers....41
Long-Term Strategic Improvement....43
Every Student Succeeds Act (ESSA) School Identification....43
Educational Effectiveness: Assessment and Evaluation....43
Integration of High-Quality Instruction, Technology, and Culturally Sustaining Curriculum....44

Learning and Work Environments That Affirm Cultural and Community Strengths..... 45
Collaborative Professional Culture, Teacher Retention, and Instructional Effectiveness.....45
Continuous Improvement and Long-Term Strategic Planning..... 47
Student & Parent Satisfaction..... 48
Environmental Education Implementation & Evaluation Plan.....51
Our Approach to Environmental Education.....52
The Environmental Literacy of Our Students: Data Collection & Analyzation..... 53
Environmental Education Successes & Challenges of the School Year..... 53
Application of Environmental Education Values & Strategies..... 54
Governance and Management..... 54
2025-2026 SRMCS Board of Directors..... 54
The Board of Directors: Governance..... 55
Board Training and Development..... 55
Initial Training..... 55
Annual Assessment of Training Needs.....56
Annual Training.....57
Annual Assessment of the Board's Performance..... 58
Management..... 59
Swan River School Management Overview.....59
Key Successes..... 59
Key Challenges & Addressing Those Challenges.....60
Staffing 2025-2026..... 62
Operational Performance.....65
Health and Safety..... 65
Transportation..... 66
Facilities.....67
Food Service Programs..... 67
Due Process and Privacy Rights of Students.....67
Parent & Community Engagement..... 68
Hiring Practices.....68
Background Checks of Employees, Board Members & Volunteers..... 69
2025–26 School Information Dissemination Activities.....69
Finances.....71
FY26 Financial Overview by Fund.....71
Revenues..... 72
Expenses.....72
Net Surplus or Deficit and Fund Balance..... 72
Comprehensive Achievement and Civic Readiness Annual Budget.....73
Strategic Planning for the Future.....73

Expansion Plans....73
Facility Changes and Long-Range Planning....73
Technology Updates....74
Educational Program Improvements....74
Financial Planning and Strategic Investments....74
Attachments....74
SRMCS Board Approved Calendar for 2025-2026....75
SRMCS Board Approved Calendar for 2026-2027....75

School Information

Contact Information

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Grades/Ages Served

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

Year Opened

Swan River Montessori Charter School opened in 2005.

Mission

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

Vision

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

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

Authorizer Information

The authorizing mission of Osprey Wilds is to ensure quality academic and environmental literacy outcomes for students in Minnesota by conducting effective oversight and evaluation of its authorized schools, providing strategic support to schools, and making informed and merit-based decisions about its portfolio of charter schools.

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

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Director of Charter School Authorizing

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SRMCS and OW: A Brief History

The relationship between Swan River Montessori and Osprey Wilds began in 2004 when the school's sponsorship was made official by the State of Minnesota. During the 2025-2026 school year, SRMCS renewed its charter with OW for another 5-year term.

Osprey Wilds has been an integral part of our school since we opened our doors in 2005. They have provided guidance in many areas including school environmental stewardship, board governance, financial oversight, and academic accountability. Our relationship with Osprey Wilds is strong and we look forward to many more years partnering with their organization as our authorizer. We are proud to be one of OW top charter schools.

Purpose of the Annual Report

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

Implementation of Primary & Additional Statutory Purposes

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

As written in the statute:

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

As Montessorians, we believe that pupil learning is a natural, internally motivated process that is inherent in every child. Simply stated, every child wants to learn. Our job as a Montessori charter school is to provide an appropriate and prepared environment that is conducive to how a child desires to learn and the pace in which it is done. If we follow the child and respect how each absorbs information, student learning becomes enjoyable and inevitable. When student learning is enjoyable and inevitable, student achievement increases as a natural response. Therefore, our teachers spend a large portion of their time ensuring each classroom has a variety of learning materials in each subject area, that these materials are well-maintained, organized, and sequenced correctly, and that each student understands how to use these materials to gain the knowledge s/he is seeking. We also provide the freedom for students to make choices about what materials to use and how long and how often they wish to use them. By giving this type of respect to each child, no matter what his/her learning style and pace is, anyone would see how each rise to the occasion.

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

(1) Increase learning opportunities for all pupils;

a. Being a Montessori school, SRMCS offers a variety of materials in each academic subject as well as a variety of materials for each category within said subject. For example, within the subject area of mathematics, there are four operations – addition, subtraction, multiplication, and division. Not only may a child choose which operation to work with, they also choose from a variety of materials within each operation. Addition alone has anywhere from 5-10 different types of materials to support learning how to add both concretely and abstractly.

b. Outside of the general education classrooms, Swan River also provides additional learning opportunities that perhaps other schools would not or could not provide due to sheer size. Because Swan River can cap its enrollment numbers, we have control over keeping our class sizes smaller and our teacher to student ratio low. This allows us to provide more 1:1 teaching time, we can easily use the outdoors as a classroom because supervision is more manageable, and we have assistants in each classroom for additional support. We are able to provide additional instruction in areas like environmental education consistently and without time/scheduling issues.

(2) Encourage the use of different and innovative teaching methods;
    a. Our students have three primary freedoms as part of our educational method. First, they have the freedom of movement – students may move throughout the classroom and work in any area of the room as they choose without needing the permission of an adult so long as it is purposeful. Second, they have the ability to choose. This includes what material they wish to use, where to use it, and how long. Finally, they are given the freedom to repeat. People often underestimate this freedom because we tend to think that if we have done something once and done it well, then we do not need to do it anymore. We believe the opposite is true. Encouraging students to repeat solidifies knowledge and solidified knowledge leads to mastery and mastery is our ultimate goal.
(3) Measure learning outcomes and create different and innovative forms of measuring outcomes;
    a. There are two primary means of measuring progress in a Montessori setting outside of standardized assessments.
        i. Observation – It is very common for a Montessori teacher to spend a portion of his/her day sitting quietly in the classroom to observe and take notes on students. Specifically, they look for purposeful movement, level of student engagement, potentially struggling students who may need additional support of some kind, and students who are showing mastery of a particular material/topic.
        ii. Peer Teaching – When a child has mastered a particular topic, it is very common that the teacher may ask that child to teach or support another child who hasn't yet. The idea behind this is simply that if a child has the knowledge to teach another, it not only proves mastery, but builds the self-esteem and level of independence of the child being given that special responsibility.
(4) Establish new forms of accountability for schools;
    a. Being a small charter school, we have the ability to establish and hold higher accountability standards more closely than perhaps a large district with numerous schools could. Rather than relying primarily on quantitative assessment data, we are able to incorporate a deeper level of accountability. Examples include
        i. collecting thorough, specific data on student and parent satisfaction;
        ii. teachers are able to provide detailed, quality evaluations of the school director and vice versa;
        iii. The school board and its members are more easily accessible to families, teachers, and the community. They know our teaching staff well, including individual strengths and weaknesses; and
        iv. The relationship between SRMCS and its authorizer, Osprey Wilds, is a positive, supportive partnership rather than hierarchical system. This type of relationship encourages increased dedication to our school and its educational method. Our authorizer is yet one more means of holding Swan River accountable for pupil learning.
(5) Create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the school site.

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

Student Enrollment & Demographics

Number of Students Enrolled

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

Below is a chart which provides trending enrollment data by grade level. The drop in enrollment for the 2021-2022 school year was due to COVID and parents seeking fully in-person 5 days a week options for their children.

	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027 (est.)
Kindergarten	31	27	31	35	34
1st Grade	20	28	24	28	31
2nd Grade	29	22	28	26	28
3rd Grade	29	28	25	25	24
4th Grade	27	29	22	24	28
5th Grade	23	24	25	21	21
6th Grade	8	5	9	12	9
Average Daily Membership (ADM)	167	163	164	171	175

Key Demographic Trends

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

Demographic Trends	2020-2021	2021-2022	2022–2023	2024–2025	2025–2026	2026–2027 (est.)
Total Enrollment	139	147	161	164	168	174
Male	61	74	72	80	82	92
Female	78	73	88	84	86	82
Special Education	28	36	42	26	33	34
LEP	0	0	0	0	0	0

African American	5	6	2	2	2	2
Latino	0	1	4	3	2	5
Asian/PI	5	5	2	5	5	1
American Indian	0	0	3	3	2	1
White	129	145	156	157	157	165
F/R Lunch	18	20	22	31	49	47

Student Attendance, Attrition & Mobility

Attendance

We observed a notable decline in attendance during FY24, decreasing from 93.3% to 77.3%. Encouragingly, enrollment rebounded to 94.1% in FY25 and FY26. At this time, the specific factors contributing to the previous decline remain unclear. Recognizing that consistent attendance is essential to student success, we are committed to monitoring this trend closely throughout the coming year. Our objective is to identify any underlying causes and collaborate with families to promote regular and sustained student attendance.

	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Overall Student Attendance Rate	95.3%	97%	93.3%	93.9%	77.3%	94.1%	94.1%

Attrition

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

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

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

Reason for Dis-enrollment	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Transferred to Local Middle School for 6th Grade	1/151= 0.66%	7/148 = 5.0%	19/167 = 11.37%	17/164 = 10.3%	19/168 = 11.3%	15/171 = 8.8%
Relocation of Primary Residence	2/151= 1.32%	0	9/167 = 5.38%	2/164 = 1.2%	9/168 = 5.3%	2/171 = 1.2%
Transfer to Student's Home District/Another Charter or Private School	8/151= 5.30%	6/148= 4.3%	4/167=2.4%	4/164 = 2.4%	4/168 = 2.3%	6/171 = 3.5%
Homeschool	4/151= 2.65%	0	3/167 =1.8%	3/164 = 1.8%	3/168 = 1.8%	3/171 = 1.8%

Total % of Students to Dis-Enroll	15/151= 9.93%	13/148= 9.4%	35/167 = 21%	26/164 = 15.8%	35/168 = 20.8%	26/171 = 15.2%

**Data does not include students who graduated from 6th grade.

Percentage of students* who were continuously enrolled between October 1 of the 2024-2025 school year and October 1 of the 2025-26 school year.	**86.9%**

**Do not include graduating students or those who have completed your school program, i.e., if your school is K-6, do not include students who have completed 6th grade.*

Percentage of students* who continued enrollment in the school from Spring 2025 to October 1, 2025.	**89.2%**

**Do not include graduating students or those who have completed your school program, i.e., if your school is K-6, do not include students who have completed 6th grade.*

It is our continuous goal to educate our families on the benefits of staying at Swan River for 6th grade. However, SRMCS also understands the desire to begin at the local middle school for 6th grade with the child's peers from the Monticello School District that our school resides in.

Student Mobility

Student mobility trends from 2020–2021 through 2025–2026 show an overall improvement in enrollment stability, despite some year-to-year fluctuations. The mobility index peaked at 17.9% in 2021–2022 before declining to a low of 1.8% in 2024–2025, when 98.2% of students remained enrolled for at least 95% of the school year. In 2025–2026, mobility increased to 8.1%, with 14 mid-year transfers, evenly divided between students entering and leaving the school. Despite this increase, mobility remains below the 2020–2021 and 2021–2022 levels. Overall enrollment has also grown from 133 students in 2020–2021 to 171 students in 2025–2026, reflecting positive long-term enrollment trends.

	October 1 ADM	Mid-Year Transfers In	Mid-year Transfers Out	Total Mid-year Transfers	Mobility Index	% of Students Enrolled 95%+
2020-2021	133	4	10	14	10.5%	89.5%
2021-2022	139	17	8	25	17.9%	82.1%
2022-2023	**167**	**10**	**12**	**22**	**7.5%**	**92.5%**
2023-2024	**164**	**10**	**10**	**20**	**6.1%**	**93.9%**
2024-2025	**164**	**3**	**3**	**6**	**1.8%**	**98.2%**
2025-2026	**171**	**7**	**7**	**14**	**8.1%**	**91.8%**

Educational Approach and Curriculum

Our Approach to Education

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

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

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

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

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

As stated above, the mission of SRMCS is "to provide a child-centered environment for self-directed and personalized learning in a small, community-based public school with an emphasis on the natural environment." We live by this mission day after day, year after year all thanks to Dr. Maria Montessori and her philosophy of education.

School Goals & Benchmarks for Instruction and Student Achievement

Per our contract with Osprey Wilds, the SRMCS lead teaching staff worked together to create reasonable, yet challenging goals to be met on a yearly basis. The majority of these goals are based on growth and proficiency targets as determined by MCAs and FastBridge assessment results. Other components include science and environmental education goals. For more information on these goals, as well as student results, please see the Academic Performance section of this report.

Alignment to State Standards

The Montessori Method does a very good job providing thorough instruction in all subject areas. However, we recognize that our curriculum may not transparently reflect Minnesota State Standards. To address this issue, all K-6th grade lead teachers meet regularly to align the Montessori curriculum/materials to state standards. Administration is responsible for staying updated on any state standard changes and relaying these updates to all relevant staff members so continued curriculum alignment can take place.

It is important to note that while Montessori education meets all Minnesota state standards, the sequencing and timing of teaching the standards may not always align. While MN academic standards are broken down by grade level, Montessori meets all standards over the course of the three-year cycle. The primary differentiation in timing and sequencing is largely due to Montessori's theory of child development. For example, there may be a first grade state standard in reading that is presented in a Montessori environment in second grade because, developmentally, the child is better able to absorb the information at that time. The reverse may also occur and the child receives a presentation earlier than his/her peers in a traditional, public school. This nonalignment does not occur often, but should be made known so there are no educational gaps in any subject area.

Remediation & Acceleration Practices

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

RTI Specialist: SRMCS also employs an on-site RTI specialist to work with students who have been flagged by teachers as needing additional help with reading and math, but who likely would not qualify for special education services.

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

Special Education

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

English Learner Program

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



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

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

Early Childhood Program

Swan River Montessori Charter School is a school based on the Montessori philosophy of education developed by Dr. Maria Montessori. Early education is a foundational component to any Montessori school, and as such, the preschool program is an integral part of the school's overall approach to education. In the Montessori model, the preschool children (ages 3 to 5) are combined with the kindergarten students in what is known as the Children's House. Montessorians believe that children at this stage of development are in a "sponge-like" phase of learning. The Montessori environment takes advantage of this unique timeframe by introducing children to what many people believe are concepts far too difficult for this age group to

understand. Examples include introduction to phonograms, the Scientific Method, all four math operations, and even highly abstract concepts such as fractions, if the child is ready.

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

Specifically, the SRMCS Early Childhood Program, part of Children's House, is home to 14-16 full-time students divided between two Montessori classrooms. Beginning in the 2019-2020 school year, the Children's House Program was no longer split into separate preschool and kindergarten groups after lunch. Rather, all students remained in their Montessori classroom all day, every day. This transition to the traditional all day multi-age groupings of a Montessori Children's House program went very well and the students thrived.

Extended Care & Essential Care Programs

Since our doors opened in 2005, SRMCS has operated a Fund 4 Extended Care Program for all enrolled families if needed. This program is open each school day beginning at 7:00 am and closes at 5:30 pm. We offer very flexible scheduling and have often provided emergency care when those situations arise. Our goal in operating this program is to provide our families with a convenient, safe place for children to attend while their parents work. Monticello has a large commuting population driving into the Twin Cities every day which is why this program has sustained high enrollment over the years.

Enrichment/Extra-Curricular Programs

EXTRA-CURRICULAR PROGRAM	OFFERED BY	GRADES SERVED
Book/Art club	Ms. Amy Savage, Children's House Teacher	K- 1st Grade
Lego Club	Ms. Amy Jensen E1 Teacher	K-6
Piano Lessons	Ms. Pam Ridpath	K-6
Cider and Canvas	Ms. Kim Dierks	2-6
Stem Club	Ms. Nicole Perez	K-6

School Staff & Our Educational Mission

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

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

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

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

School Calendar & Daily Schedule

School Calendar: SRMCS mirrors its annual school calendar from Monticello School District #882 because our students utilize their bussing services. Therefore, we are closed the same days, hold the same holiday/vacation schedules, and hold all early dismissal days as they do. During 2025-2026, there were 162 scheduled instructional days with school starting at 7:50 a.m. and ending at 2:10 p.m. These board-approved changes ensured that all MN statutes relating to required instruction were met. By year's end students received 59,040 minutes of instruction.

To view the board-approved 2025-2026 school calendar, please see Attachment 1. To view the board-approved 2026-2027 school calendar, please see Attachment 2.

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

7:00 A.M. Extended Care (contracted families only)
7:50 School begins
Work/lessons in the classroom

11:00 Lunch
11:30 Recess
12:00 Work/lessons in the classroom
Specials classes
2:10 Dismissal
2:20 P.M. Extended Care (contracted families only)

Innovative Practices and Implementation



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

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

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

- Classrooms featuring mentoring relationships that are developed and nurtured over several years.
- There is an emphasis on the social/emotional component as part of our holistic approach (along with cognitive and motor) to child development.
- Montessori provides an "amoeba-like" curriculum that can change its shape to meet the needs of the child, not a system of education that seeks to mold individuals into one unit.

- We utilize a curriculum that features the interrelatedness of subject areas, not just stacks of unrelated facts.
- We use a pace of learning that is individualized, encouraging and accepting, not critical, degrading, or a-motivational.

Academic Performance: Goals & Benchmarks

Progress on OW Contractual, Academic & CARC Alignment

The following are contracted goals agreed upon between Swan River Montessori Charter School and its authorizer, Osprey Wilds. The purpose of these goals is to ensure that students are making adequate academic progress year after year in the eyes of all constituencies – the SRMCS Board of Directors, the authorizer, and the State of Minnesota. Each is categorized under one of the five Comprehensive Achievement and Civic Readiness (CACR) Goal Areas:

- Ready for Kindergarten [R4K]: All students meet school readiness goals.
- Achievement Gap Closure [AGC]: All racial and economic achievement gaps between
- students are closed.
- Career and College Ready [CCR]: All students are career- and college-ready before
- graduating from high school.
- Graduate from High School [GRAD]: All students graduate from high school.
- Lifelong Learners [LL]: All students are prepared to be lifelong learners.

Indicator 1: Mission-Related Outcomes

School Goal: *Over the period of the contract, students at Swan River Montessori Charter School (SRMCS) will demonstrate growth in four child development categories (normalization, independence, social/emotional wellbeing & community engagement) according to the Montessori Planes of Development as measured by a locally-developed assessment rubric.*			
Performance Ratings	**Measure 1.1 [LL]:** From FY26 to FY30, the annual average score for all students in grades K-6 will be equal to or greater than 12 points (out of 16) as measured by the "Montessori Planes of Development: Student Growth Assessment" rubric administered annually in the spring.	**Results for 2025-2026:**	
Exceeds Target (x1.5)	The aggregate score is equal to or greater than 14 points.		
Meets Target (x1.0)	The aggregate score is equal to or greater than 12 points.	X	12.5
Approaches Target (x0.5)	The aggregate score is greater than 8 points.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

Indicator 1 Trend Data			
	Average Score	**Total Possible**	**Number of Students**
FY21	13.2	16	134
FY22	12.3	16	98*
FY23	12.5	16	142
FY24	12.6	16	167
FY25	12.3	16	165
FY26	12.5	16	171
Average Score = 12.5			

As the results show, students did well and met the goal stated above for the school year. Trends over time show results remain generally equal year after year. Though it remains challenging to quantify such subjective data, our teachers do their very best standardizing student scores.
*One class was not completed due to covid and teacher transitioning to new role

Indicator 2: English Language Learners

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

Indicator 3: Reading Growth

School Goal: *Over the period of the contract, students at SRMCS will demonstrate growth in reading as measured by state accountability tests.*			
		Points	Results
Ratings	**Measure 3.1 [CCR]: In aggregate, from FY26 to FY30, the overall percentage of students whose achievement level on the statewide assessments for reading (as measured by North Star Academic Progress) improved on statewide assessments is equal to or greater than the state percentage.**	**2**	
Exceeds Target (x 1.5)	The school achieves an overall percentage greater than 10 percentage points over that of the state.	**X**	**14.8%**
Meets Target (x1.0)	The school achieves an overall percentage equal to or greater than that of the state.		
Approaches Target (x0.5)	The school achieves an overall percentage that is within 10 percentage points of the state.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 3.2 [CCR]: In aggregate, from FY26 to FY30, the overall percentage of students whose achievement level decreased or stayed "does not meet standards" on statewide assessments for reading (as measured by North Star Academic Progress) is equal to or less than the state.**	**6**	
Exceeds Target (x 1.5)	The school achieves an overall percentage at least 10 percentage points less than that of the state.		
Meets Target (x1.0)	The school achieves an overall percentage less than or equal to that of the state.	**N/A**	**N/A**
Approaches Target (x0.5)	The school achieves an overall percentage that is no more than 10 percentage points greater than that of the state.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 3.3 [RG3]: From FY26 to FY30, the aggregate percentage of K-1 grade students that are "Low Risk" on the spring FastBridge assessment, OR from fall to spring move from "High Risk" to "Some Risk" will be at least 55%**	**3**	
Exceeds Target (x 1.5)	The aggregate percentage is at least 65%.	**X**	**65.1%**
Meets Target (x1.0)	The aggregate percentage is at least 55%.		
Approaches Target (x0.5)	The aggregate percentage is at least 45%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 3.4 [RG3]: From FY26 to FY30, the aggregate percentage of 2-6 grade students that are "Low Risk" on the spring FastBridge assessment, OR from fall to spring move from "High Risk" to "Some Risk" will be at least 55%**	**9**	
Exceeds Target (x 1.5)	The aggregate percentage is at least 65%.	**X**	**73.1%**
Meets Target (x1.0)	The aggregate percentage is at least 55%.		
Approaches Target (x0.5)	The aggregate percentage is at least 45%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

Indicator 4: Math Growth

School Goal: Over the period of the contract, students at SRMCS will demonstrate growth in math as measured by state accountability tests.			
		Points	**Result:**
Performance Ratings	**Measure 4.1 [CCR]: In aggregate, from FY26 to FY30, the overall percentage of students whose achievement level on the statewide assessments for math (as measured by North Star Academic Progress) improved on statewide assessments is equal to or greater than the state percentage.**	**2**	
Exceeds Target (x 1.5)	The school achieves an overall percentage greater than 10 percentage points over that of the state.		
Meets Target (x1.0)	The school achieves an overall percentage equal to or greater than that of the state.	**X**	**8.7%**
Approaches Target (x0.5)	The school achieves an overall percentage that is within 10 percentage points of the state.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	**Results**
Performance Ratings	**Measure 4.2 [CCR]: In aggregate, from FY26 to FY30, the overall percentage of students whose achievement level decreased or stayed "does not meet standards" on statewide assessments for math (as measured by North Star Academic Progress) is equal to or less than the state.**	**6**	
Exceeds Target (x 1.5)	The school achieves an overall percentage at least 10 percentage points less than that of the state.		
Meets Target (x1.0)	The school achieves an overall percentage less than or equal to that of the state.	**X**	**4.9%**
Approaches Target (x0.5)	The school achieves an overall percentage that is no more than 10 percentage points greater than that of the state.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		
		Points	**Results**
Performance Ratings	**Measure 4.3 [CCR]: From FY26 to FY30, the aggregate percentage of K-1 grade students that are "Low Risk" on the spring FastBridge assessment, OR from fall to spring move from "High Risk" to "Some Risk" will be at least 55%**	**3**	
Exceeds Target (x 1.5)	The aggregate percentage is at least 65%.		
Meets Target (x1.0)	The aggregate percentage is at least 55%.	**X**	**61.3%**
Approaches Target (x0.5)	The aggregate percentage is at least 45%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 4.4 [CCR]: From FY26 to FY30, the aggregate percentage of 2-6 grade students that are "Low Risk" on the spring FastBridge assessment, OR from fall to spring move from "High Risk" to "Some Risk" will be at least 55%**	**9**	
Exceeds Target (x 1.5)	The aggregate percentage is at least 65%.	**X**	**69.7%**
Meets Target (x1.0)	The aggregate percentage is at least 55%.		
Approaches Target (x0.5)	The aggregate percentage is at least 45%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

Indicator 5: Reading Proficiency

School Goal: Over the period of the contract, students at SRMCS will demonstrate proficiency in reading as measured by state accountability tests and nationally normed assessments.			
		Points	**Results**
Performance Ratings	**Measure 5.1 [RG3]: From FY26 to FY30, the school's aggregate percentage of students in grade 3 achieving the 40th percentile (using nationally normed data from FastBridge Norms reports) will be at least 50%.**	**2**	
Exceeds Target (x 1.5)	The aggregate percentage is at least 60%.	**X**	**60.0%**
Meets Target (x1.0)	The aggregate percentage is at least 50%.		
Approaches Target (x0.5)	The aggregate percentage is at least 40%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 5.2 [CCR]: From FY26 to FY30, the school's aggregate proficiency index score for all students in grades 3-6 will be equal to or greater than that of the state for the same grades (3-6).**	**8**	
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10 points greater than the state's score.	**X**	**14.8%**
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the state's score.		
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5 points of the state's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 5.3 [AGC]: From FY26 to FY30, the school's aggregate proficiency index score for students in the Special Education group will be equal to or greater than that of the state for the same group and the same grades (3-6).**	**2**	
Exceeds Target (x 1.5)	The school's aggregate proficiency index score at least 10 points above the state's score.	**X**	**24.5%**
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the state's score.		
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5 points of the state's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 5.4 [AGC]: From FY26 to FY30, the school's aggregate proficiency index score for students in the Special Education group will be equal to or greater than the resident district (ISD 882 – Monticello) for the same group and the same grades (3-6).**	**2**	
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10 points above the resident district's score.		
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the resident district's score.	**X**	**6.1%**
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5 points of the resident district's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

Indicator 6: Math Proficiency

School Goal: Over the period of the contract, students at SRMCS will demonstrate proficiency in math as measured by state accountability tests.			
		Points	**Results**
Performance Ratings	**Measure 6.1 [CCR]: From FY26 to FY30, the school's aggregate proficiency index score for students in grades 3-6 will be equal to or greater than that of the state for the same grades (3-6).**	**8**	
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points greater than the state's score.		
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the state's score.	**X**	**8.6%**
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5.0 points of the state's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 6.2 [CCR]: In aggregate, from FY26 to FY30, the school's aggregate proficiency index score for the Free/Reduced Price Lunch student group will be greater than that of the state for the same student group and the same grades (3-6).**	**2**	
Exceeds Target (x 1.5)	The school achieves an aggregate proficiency index score at least 10 points above the state's score.		
Meets Target (x1.0)	The school achieves an aggregate proficiency index score is greater than the state's score.	**X**	**0.3%**
Approaches Target (x0.5)	The school achieves an aggregate proficiency index score is within 5 points of the state's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 6.3 [AGC]: From FY26 to FY30, the school's aggregate proficiency index score for the Special Education student group will be equal to or greater than the resident district (ISD 882 – Monticello) for the same group and the same grades (3-6).**	**2**	
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10 points above the resident district's score.		
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the resident district's score.	**X**	**9.9%**
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5 points of the resident district's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

Indicator 7: Science Proficiency & Growth

School Goal: Over the period of the contract, students at SRMCS will demonstrate proficiency in science as measured by state accountability tests.			
		Points	**Results**
Performance Ratings	**Measure 7.1 [CCR]: From FY26 to FY30, the school's aggregate proficiency index score for students in grade 5 will be equal to or greater than that of the state for the same grade (5).**	**4**	
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10 points greater than the state's score.		
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the state's score.		
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5 points of the state's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	**X**	**-5.5%**

		Points	Results

Performance Ratings	**Measure 7.2 [CCR]: From FY26 to FY30, the school's aggregate proficiency index score for students in grade 5 will be equal to or greater than the resident district (ISD 882 – Monticello) for the same grade (5).**	**3**	
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10 points above the resident district's score.		
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the resident district's score.		
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5 points of the resident district's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	**X**	**-12.8%**

		Points	**Results**
Performance Ratings	**Measure 7.3 [AGC]: From FY26 to FY30, the school's aggregate proficiency index score for the Special Education student group will be equal to or greater than the state for the same group and the same grades (5).**	**1**	
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10 points greater than the state's score.		
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the state's score.		
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5 points of the state's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	**N/A**	**N/A**

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

School Goal: Over the period of the contract, preschool and prekindergarten students enrolled at SRMCS will demonstrate readiness for kindergarten, kindergarten students will be assessed for kindergarten readiness, and students in grades 1-6 will demonstrate increased proficiency in writing skills.			
		Points	**Results**
Performance Ratings	**Measure 8.1 [R4K]: From FY27 to FY30, the aggregate percentage of students enrolled in preschool or prekindergarten and entering kindergarten the next school year who meet or exceed kindergarten readiness standards as measured by a comprehensive child assessment aligned with ECIPS and assessed annually in the spring will be at least 85%.**	**1**	
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10 points greater than the state's score.		
Meets Target (x1.0)	The school's aggregate proficiency index score is equal to or greater than the state's score.		
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 5 points of the state's score.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	**N/A**	**N/A**

		Points	Results
Performance Ratings	**Measure 8.2 [CCR] : From FY26 to FY30, the aggregate percentage of students in grades 1-6 who increase (or maintain if above 90%) proficiency in writing skills from winter to spring as measured by the locally-developed E1 First Grade, E1 Second & Third Grade, and E2 Writing Assessment rubrics will be at least 90%.**	**8**	
Exceeds Target (x 1.5)	The aggregate percentage is at least 95%.		
Meets Target (x1.0)	The aggregate percentage is at least 90%.		
Approaches Target (x0.5)	The aggregate percentage is at least 80%.	**X**	**86.2%**
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

		Points	Results
Performance Ratings	**Measure 8.3 [R4K]: From FY26 to FY30, the aggregate percentage of incoming kindergarten students assessed in early fall for the purpose of determining their readiness and instructional levels using a State approved assessment will be at least 90%.**	**1**	
Exceeds Target (x 1.5)	The aggregate percentage is at least 95%.		
Meets Target (x1.0)	The aggregate percentage is at least 90%.		
Approaches Target (x0.5)	The aggregate percentage is at least 80%.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	**N/A**	**N/A**

Indicator 9: Post-Secondary Readiness

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

Indicator 10: Engagement

School Goal: Over the period of the contract, students at SRMCS will be engaged in the school environment at high rates.			
		Points	**Results**
Performance Ratings	**Measure 10.1: From FY26-FY30, the average of the school's annual consistent attendance rates is equal to or greater than the state's rate.**	**6**	
Exceeds Target (x 1.5)	The average of the school's consistent attendance rates is 5 percentage points greater than that of the state.	**X**	**17.6%**
Meets Target (x1.0)	The average of the school's consistent attendance rates is equal to or greater than that of the state.		
Approaches Target (x0.5)	The average of the school's consistent attendance rates is within 5 percentage points of the state.		
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		

Federal & State Accountability:

Proficiency Rates in Percentages: MATH						
	Swan River Montessori	State of MN	Local District	World Learners Montessori	New Discoveries Montessori	Bluffview Montessori
2022	45.0	44.6	60.3	39.4	21.5	52.5
2023	23.8	44.4	54.9	39.7	34.7	47.4
2024	50.6	45.5	63.4	32.6	30.1	49.3
2025	42.7	45.2	56.0	39.0	28.4	43.8
2026	**47.7**	**42.2**	**46.5**	**37.4**	**32.7**	**47.7**

Proficiency Rates in Percentages: READING						
	Swan River Montessori	State of MN	Local District	World Learners Montessori	New Discoveries Montessori	Bluffview Montessori
2022	60.0	51.0	59.1	60.6	39.3	70.5
2023	66.7	58.7	63.74	58.2	47.5	71.9
2024	63.3	49.9	55.1	45.3	49.1	60.3
2025	61.6	49.6	59.5	54.2	38.5	64.7
2026	**59.4**	**46.2**	**51.0**	**51.8**	**43.9**	**60.7**

Proficiency Rates in Percentages: SCIENCE (5th Grade Only)						
	Swan River Montessori	State of MN	Local District	World Learners Montessori	New Discoveries Montessori	Bluffview Montessori
2022	61.5	49.8	60.7	62.5	31.0	61.0
2023	38.1	48.54	49.6	38.7	28	62.5
2024	45.5	45	60.9	57.1	36	75
2025	36.4	26.5	35.4	8.3	30.4	26.9
2026	**20**	**25.9**	**32.8**	**16.1**	**22.2**	**24.0**

Additional Comprehensive Achievement and Civic Readiness

Assessing Student Progress and Instructional Strengths

Swan River Montessori Charter School (SRMCS) implements a comprehensive assessment and instructional review process to monitor student achievement, identify instructional strengths and areas for improvement, and ensure equitable learning opportunities for all students. The school's Comprehensive Achievement and Civic Readiness (CACR) Strategic Plan, adopted by the School Board on October 21, 2025, establishes a framework for continuous improvement through data-informed decision-making, individualized instruction, and alignment with Minnesota Academic Standards.

Assessment of Student Progress

SRMCS utilizes multiple assessment measures to evaluate student progress toward state and local academic standards. These include the Minnesota Comprehensive Assessments (MCA-III), FastBridge universal screening assessments, classroom-based assessments, Montessori progress reports, and teacher observations. FastBridge assessments are administered in the fall, winter, and spring to monitor student growth, identify students requiring additional support, and evaluate the effectiveness of instructional interventions.

During the 2025–26 school year, SRMCS strengthened its literacy assessment and instructional practices through the implementation of the Phonological Awareness Screening Test (PAST), Kilpatrick's *Equipped for Reading Success*, and UFLI Foundations. PAST assessments were used to identify students' phonological awareness skills and guide targeted instruction. By the end of the school year, 80% of students achieved the expected phonological awareness level on the PAST assessment, demonstrating positive foundational literacy outcomes and identifying students who would benefit from continued intervention.

FY2025–26 FastBridge reading results also demonstrated positive outcomes. In grades K–1, 65.1% of students met the school's established reading performance criteria, exceeding the target of 55%. In grades 2–6, 73.1% met the established reading performance criteria, also exceeding the target. In mathematics, 61.3% of K–1 students and 69.7% of students in grades 2–6 met the established performance criteria, meeting or exceeding the school's targets.

On statewide assessments, SRMCS achieved proficiency rates of 59.4% in reading and 47.7% in mathematics, exceeding the corresponding statewide averages of 46.2% and 42.2%. Assessment results are reviewed to guide differentiated instruction, identify students requiring interventions or enrichment, and support continuous academic growth.

Data Disaggregation and Educational Effectiveness

SRMCS reviews student achievement data by student group, including race and ethnicity, socioeconomic status, English learner status, foster care status, and students receiving special education services, when applicable. Data are analyzed to identify differences in academic achievement, evaluate instructional effectiveness, and determine whether additional supports are

necessary. Due to the school's small enrollment, subgroup data are reported only when sufficient numbers of students are available to protect student privacy.

During FY2025–26, students eligible for free or reduced-price lunch demonstrated strong reading outcomes compared to their statewide peers. SRMCS achieved a reading proficiency rate of 60.0% for this student group, compared to the statewide rate of 31.6%, exceeding the state average by 28.4 percentage points. In mathematics, SRMCS achieved a proficiency rate of 26.3%, compared to the statewide rate of 26.1%. Science proficiency data for this student group were not reportable due to the small number of students.

Students receiving special education services also demonstrated positive outcomes relative to comparison groups. The school's reading proficiency index for students receiving special education services exceeded the state comparison by 24.5 points and the local district comparison by 6.1 points. In mathematics, the special education proficiency index exceeded the local district comparison by 9.9 points.

These results provide valuable information regarding the school's educational effectiveness across student groups and help guide decisions regarding instructional resources and student support.

Equitable Student Outcomes and Achievement Gap Closure
SRMCS is committed to providing equitable educational opportunities and reducing achievement gaps among student groups. The school utilizes a Multi-Tiered System of Supports (MTSS) to identify students performing below grade-level expectations and provide targeted academic and social-emotional interventions.

Students requiring additional support are referred to the school's Child Find Team, which includes classroom teachers, special education staff, instructional support personnel, and school administration. The team reviews student performance, identifies appropriate interventions, and monitors progress to determine whether additional instructional adjustments or evaluations are necessary.

During FY2025–26, SRMCS strengthened foundational literacy instruction through the implementation of PAST assessments, Kilpatrick's *Equipped for Reading Success*, and UFLI Foundations. These resources supported the identification of specific phonological awareness and reading skill deficits and provided systematic, evidence-based literacy instruction.

The school's reading proficiency results for economically disadvantaged students exceeded the statewide average for the same student group by 28.4 percentage points. Mathematics proficiency for this group was comparable to the statewide rate, indicating an area for continued instructional focus.

SRMCS will continue monitoring student achievement by subgroup, evaluating the effectiveness of interventions, and adjusting instructional practices to address identified learning gaps.

Gifted and Talented Identification and Accelerated Instruction
SRMCS identifies students demonstrating advanced academic abilities through classroom performance, teacher observations, assessment results, and demonstrated mastery of academic concepts. Teachers document students who consistently perform above grade-level expectations or demonstrate exceptional aptitude and refer students for additional review when appropriate.

The Montessori multi-age classroom structure provides natural opportunities for individualized pacing and accelerated instruction. Students demonstrating mastery may progress to advanced academic materials, participate in higher-level lessons, complete extended research projects, or engage in enrichment activities designed to deepen conceptual understanding.

Students requiring additional acceleration may be referred to the school's student support team to determine appropriate instructional opportunities. SRMCS maintains procedures for grade acceleration and early admission consistent with Minnesota Statutes, section 120B.15, incorporating developmental readiness, assessment information, teacher recommendations, and family consultation.

Evaluation of Instructional Strengths and Areas for Improvement
SRMCS evaluates instructional effectiveness through student achievement data, classroom observations, teacher evaluations, and professional collaboration. School leadership conducts classroom walkthroughs and works with teachers to identify effective instructional practices, strengthen consistency, and address areas requiring improvement.

The Montessori educational model provides instructional strengths through individualized learning, hands-on materials, student independence, and opportunities for students to progress according to demonstrated mastery.

FY2025–26 assessment results identified reading and mathematics as areas of relative strength. Reading proficiency exceeded the statewide average by 13.2 percentage points and the local district average by 8.4 percentage points. Mathematics proficiency exceeded the statewide average by 5.5 percentage points and the local district average by 1.2 percentage points.

The school also identified areas requiring continued improvement. Fifth-grade science proficiency was 20.0%, compared to 25.9% statewide and 32.8% in the local district. Additionally, 86.2% of students in grades 1–6 demonstrated the targeted writing growth or maintained proficiency above 90%, falling short of the school's established 90% goal. These findings will inform instructional planning, professional development, and targeted improvements in science and writing instruction.

The implementation of PAST assessments, Kilpatrick's *Equipped for Reading Success*, and UFLI Foundations during FY2025–26 reflects the school's continued efforts to strengthen evidence-based literacy instruction. With 80% of students achieving expected phonological awareness levels by the end of the school year, the school will continue prioritizing targeted instruction for students who have not yet met developmental expectations.

Evaluation of Curriculum Strengths and Weaknesses
SRMCS conducts ongoing reviews of curriculum effectiveness through student achievement results, teacher feedback, classroom observations, and alignment with Minnesota Academic Standards. Teachers regularly review Montessori instructional materials and lesson sequences to ensure students have opportunities to master grade-level standards within the school's three-year instructional cycles.

During FY2025–26, the school strengthened foundational literacy instruction through the implementation of Kilpatrick's *Equipped for Reading Success* and UFLI Foundations. These resources supplemented the Montessori curriculum by providing explicit, systematic instruction in phonological awareness, phonemic awareness, phonics, and decoding.
The school's assessment results also identified opportunities to strengthen science instruction and writing development. These areas will remain priorities in curriculum review, instructional planning, and professional development.

As part of its continuous improvement process, SRMCS identified additional opportunities to strengthen the consistency of evidence-based literacy instruction across grade levels. This work established a foundation for continued curriculum improvements during FY2026–27, including the planned implementation of All About Reading.

Curriculum reviews also consider academic rigor, accessibility, cultural responsiveness, and the needs of students requiring intervention or enrichment. These practices support the school's long-term goal of preparing students for continued academic success, career readiness, and meaningful civic participation.

Civic Readiness and Whole-Child Development
In addition to academic achievement, SRMCS evaluates student growth in normalization, independence, social-emotional well-being, and community engagement using its Montessori Planes of Development: Student Growth Assessment rubric.

During FY2025–26, students achieved an average score of 12.5 out of 16, meeting the school's established goal of at least 12 points. These results reflect the school's continued emphasis on developing independent learners, responsible community members, and students prepared for lifelong learning.



Through ongoing assessment, individualized instruction, curriculum review, and continuous improvement, SRMCS remains committed to strengthening academic achievement, addressing learning gaps, and preparing all students for future academic and civic success.

Curriculum and Instruction Review System
Swan River Montessori Charter School (SRMCS) maintains a comprehensive system for periodically reviewing and evaluating curriculum, instructional practices, student achievement, and instructional leadership. This system is aligned with the school's Comprehensive Achievement and Civic Readiness (CACR) Strategic Plan and Minnesota

Academic Standards. The review process incorporates student assessment data, classroom observations, teacher evaluations, professional collaboration, curriculum reviews, and School Board oversight.
The school's long-term strategic approach emphasizes continuous improvement, evidence-based instruction, Montessori educational principles, equitable student outcomes, and the development of students who are academically prepared, independent, and responsible members of their communities.

Strategies and Instructional Best Practices
SRMCS evaluates instructional practices through classroom observations, teacher collaboration, professional development, and analysis of student achievement data. The Montessori educational model emphasizes individualized instruction, hands-on learning, differentiated instruction, student independence, and opportunities for students to progress according to demonstrated mastery.

The Executive Director conducts monthly classroom walkthroughs to monitor instructional practices, classroom environments, student engagement, and implementation of Montessori methodology. These observations provide opportunities to identify instructional strengths, recognize effective practices, and determine areas where additional support or professional development may be beneficial.

During FY2025–26, SRMCS strengthened evidence-based literacy instruction through the implementation of the Phonological Awareness Screening Test (PAST), Kilpatrick's *Equipped for Reading Success*, and UFLI Foundations. These resources supported systematic instruction in phonological awareness, phonemic awareness, phonics, and decoding.

Professional development and instructional collaboration support the integration of research-based instructional strategies with Montessori methodology. Curriculum and instructional practices are reviewed for alignment with Minnesota Academic Standards and the needs of students at varying academic levels.

Student Outcomes and Curriculum Effectiveness
Student achievement data are central to the school's curriculum and instructional review process. SRMCS utilizes Minnesota Comprehensive Assessments (MCA-III), FastBridge universal screening, PAST assessments, classroom-based assessments, and Montessori progress reports to monitor student growth and evaluate instructional effectiveness.

During FY2025–26, FastBridge results demonstrated positive outcomes in reading and mathematics. In reading, 65.1% of students in grades K–1 and 73.1% of students in grades 2–6 met the school's established performance criteria. Mathematics results indicated that 61.3% of students in grades K–1 and 69.7% of students in grades 2–6 met the established criteria. Additionally, 80% of students achieved the expected phonological awareness level on the PAST assessment by the end of the school year.

On statewide assessments, SRMCS achieved reading proficiency of 59.4%, compared to 46.2% statewide, and mathematics proficiency of 47.7%, compared to 42.2% statewide.

Students eligible for free or reduced-price lunch demonstrated particularly strong reading outcomes. This student group achieved 60.0% reading proficiency, compared to 31.6% statewide. Mathematics proficiency was 26.3%, compared to 26.1% statewide. Science results for this subgroup were not reportable due to insufficient student numbers.

Assessment results also identified areas requiring additional instructional attention. Fifth-grade science proficiency was 20.0%, below the statewide average of 25.9%. Writing assessment results indicated that 86.2% of students in grades 1–6 met the school's growth or maintenance criteria, approaching the established 90% target.

These findings guide curriculum reviews, instructional planning, professional development, and decisions regarding supplemental instructional materials and targeted interventions.

School Director Evaluation and Instructional Leadership

The SRMCS Board of Directors conducts an annual evaluation of the Executive Director to assess leadership effectiveness, recognize professional strengths, and establish goals for continuous improvement. The evaluation process supports accountability, professional growth, and alignment with the school's Comprehensive Achievement and Civic Readiness Strategic Plan.

In the 2025 Director Evaluation, the Board recognized strengths in financial management, problem-solving, Montessori leadership, school-community engagement, and the Director's ability to provide the Board with information necessary for informed decision-making. The Board also acknowledged professional growth in understanding legislative changes and participating in READ Act training.

The Board established the following professional development priorities for the 2025–26 school year:

- Staff Support and Development: Offer individual staff check-ins during the fall and maintain consistent onboarding procedures to ensure new employees receive appropriate support.
- Montessori Instructional Leadership: Organize and facilitate Montessori professional learning opportunities, including a book study or training, with an emphasis on implementing Science of Reading practices.
- Classroom Observations: Conduct 15–20-minute observations in each classroom by December and again by March. These observations are intended to strengthen understanding of Montessori classroom practices and are separate from formal employee evaluations. The Board established a process for documenting observations and monitoring progress through monthly Board agendas.
- READ Act Implementation: Continue monitoring and implementing READ Act requirements and Minnesota Academic Standards while integrating evidence-based literacy practices with Montessori methodology.
- Financial Oversight: Maintain ongoing communication with the Board regarding school finances, budget concerns, and anticipated financial changes.

These goals establish expectations for the Executive Director's instructional leadership, professional communication, staff development, and organizational management. The Board's

evaluation process supports continuous improvement by identifying leadership strengths and establishing priorities that contribute to effective teaching, student achievement, and the school's long-term strategic goals.

Equitable Access to Effective Teachers
SRMCS is committed to ensuring that all students have equitable access to qualified, effective teachers who provide high-quality instruction and support diverse student needs.
During FY2025–26, SRMCS employed 30 staff members, including 12 licensed staff members and seven lead classroom teachers. Of the total staff, two employees (6.7%) identified as an ethnicity other than White. Among licensed staff, one of 12 employees (8.3%) identified as an ethnicity other than White. Of the seven lead classroom teachers, one (14.3%) identified as an ethnicity other than White.

SRMCS recognizes the importance of building a diverse teaching staff that reflects the students and families it serves. The school considers Minnesota teaching licensure, professional qualifications, Montessori training, instructional effectiveness, and the ability to meet diverse student needs when making hiring and staffing decisions.

The school monitors instructional effectiveness through monthly classroom walkthroughs, twice-yearly staff meetings with the Executive Director, and annual teacher evaluations using the Danielson Framework for Teaching. These practices help ensure that students have access to effective instruction and that teachers receive appropriate professional support.
SRMCS will continue promoting inclusive recruitment and retention practices, strengthening culturally responsive instruction, and supporting a school environment where students benefit from diverse perspectives and experiences.

Teacher Evaluation and Professional Growth
SRMCS maintains a structured teacher evaluation process designed to promote professional growth, instructional effectiveness, and continuous improvement in alignment with Minnesota Statutes, section 122A.40, subdivision 8.

The Executive Director conducts monthly classroom walkthroughs to observe classroom environments, instructional delivery, student engagement, classroom management, and implementation of Montessori practices.

Staff members meet individually with the Executive Director twice each school year to discuss professional performance, instructional practices, professional goals, and areas for continued development.

Teachers receive one final annual evaluation using the Danielson Framework for Teaching. This framework provides a structured approach to evaluating professional responsibilities, classroom environment, planning and preparation, and instruction.

The evaluation process supports constructive feedback, professional reflection, identification of instructional strengths, and development of improvement goals. Information gathered through

classroom walkthroughs, staff meetings, student achievement data, and formal evaluations helps inform professional development and instructional support.
During FY2025–26, professional learning priorities included strengthening evidence-based literacy instruction and integrating Science of Reading practices with Montessori methodology.

Continuous Curriculum Review and Improvement
Swan River Montessori Charter School (SRMCS) is committed to improving student achievement through a comprehensive, long-term strategic approach that integrates Montessori educational principles, Minnesota Academic Standards, evidence-based instructional practices, and targeted academic interventions. The school's Comprehensive Achievement and Civic Readiness (CACR) Strategic Plan emphasizes continuous improvement through assessment, instructional planning, professional development, and ongoing evaluation of student outcomes.

SRMCS uses student achievement data to identify instructional strengths and areas for improvement, guide curriculum decisions, and ensure students receive appropriate academic support. The school's long-term priorities include strengthening foundational literacy and mathematics instruction, increasing academic proficiency, reducing achievement gaps, and preparing students for continued academic success and responsible civic participation.

SRMCS regularly reviews its curriculum to ensure alignment with Minnesota Academic Standards, Montessori educational principles, and research-based instructional practices. Teachers evaluate instructional materials, lesson sequences, and student performance to identify opportunities to strengthen academic instruction.

During FY2025–26, SRMCS strengthened foundational literacy instruction through the implementation of the Phonological Awareness Screening Test (PAST), Kilpatrick's *Equipped for Reading Success*, and UFLI Foundations. These resources provided additional structure for identifying phonological awareness needs and delivering systematic instruction in foundational reading skills.

By the end of the school year, 80% of students achieved the expected phonological awareness level on the PAST assessment. These results help identify students requiring additional instruction and guide future literacy interventions.

The school also identified opportunities to strengthen science and writing instruction based on FY2025–26 assessment results. Fifth-grade science proficiency was 20.0%, compared to 25.9% statewide, while 86.2% of students in grades 1–6 met the school's writing growth or maintenance criteria, approaching the established 90% target.

These findings guide curriculum reviews, instructional planning, and professional development. For FY2026–27, SRMCS plans to implement All About Reading to further strengthen structured literacy instruction.

Improvement of Instructional Practices

SRMCS supports instructional improvement through ongoing professional development, classroom observations, teacher collaboration, and analysis of student achievement data.

The Executive Director conducts monthly classroom walkthroughs to observe instructional delivery, student engagement, classroom environments, and implementation of Montessori practices. Staff members meet individually with the Executive Director twice annually to discuss instructional effectiveness, professional goals, and areas for continued development. Teachers receive an annual evaluation using the Danielson Framework for Teaching.

Professional learning priorities include integrating Science of Reading practices with Montessori instruction, strengthening differentiated instruction, and ensuring consistent implementation of evidence-based literacy practices.

The school administers FastBridge universal screening assessments in the fall, winter, and spring to monitor academic progress and identify students requiring additional support. PAST assessments provide additional information regarding students' phonological awareness development.

These strategies support the school's efforts to improve instructional quality, strengthen student engagement, and increase academic achievement across grade levels.

Response to Intervention and Targeted Academic Support

SRMCS utilizes a Response to Intervention (RTI) framework as part of its Multi-Tiered System of Supports (MTSS) to identify students experiencing academic difficulties and provide targeted interventions.

A large majority of school staff, including teachers, classroom assistants, and program paraprofessionals, have received training in RTI practices. This collaborative approach supports early identification, intervention planning, and ongoing progress monitoring.

All students in kindergarten through sixth grade participate in FastBridge universal screening to assess reading and mathematics skills. Screening results, teacher observations, and recommendations from the Child Find Team help determine which students require supplemental instruction.

SRMCS employs part-time literacy and mathematics specialists who provide individualized and small-group interventions for students identified as academically at risk. Depending on student needs, specialists typically maintain caseloads of approximately 10–20 students and provide instruction three to four days per week for approximately 30 minutes per session.

In addition to school-based RTI services, SRMCS participates in Math Corps and Reading Corps to provide targeted academic support.

FY2025–26 Intervention Participation

Intervention Program	Students Served
Mathematics RTI	22
Reading RTI	33
Math Corps	27

Reading Corps	19
Total Program Participations	101

The participation figures represent program enrollments rather than unique students, as some students received services through more than one intervention program.

FY2025–26 Intervention Outcomes

SRMCS tracks students who successfully graduate from intervention programs separately from students who transition to special education services or require continued academic support.

Mathematics RTI: During FY2025–26, 22 students participated in Mathematics RTI. Eleven students (50.0%) successfully graduated from the intervention program, two students (9.1%) transitioned to special education services, and three students (13.6%) were identified for spring special education evaluations. Six additional students (27.3%) were identified as requiring continued mathematics intervention or support.

Reading RTI: During FY2025–26, 33 students participated in Reading RTI. Seven students (21.2%) transitioned to special education services, one student (3.0%) transitioned to Reading Corps, and seven students were recommended for fluency-focused instruction. The remaining records did not document a formal graduation or transition outcome.

Math Corps: During FY2025–26, 27 students participated in Math Corps. The program provided supplemental mathematics instruction for students requiring additional support in foundational mathematics skills. The available participation data did not establish a complete program graduation or transition rate.

Reading Corps: During FY2025–26, 19 students participated in Reading Corps. Four students (21.1%) successfully graduated from the program, while four students (21.1%) transitioned to school-based RTI services. The remaining 11 student records did not document a formal graduation or transition outcome.

Using Intervention Outcomes to Improve Instruction

SRMCS reviews intervention outcomes to determine whether students are making sufficient academic progress, require continued instruction, or need additional evaluation.

Students who successfully meet intervention goals may graduate from the program, while students with ongoing academic needs continue receiving supplemental instruction or transition to other appropriate services. When student progress indicates the possibility of a disability, the Child Find Team considers whether a special education evaluation is warranted.

During FY2025–26, the implementation of PAST assessments, Kilpatrick's *Equipped for Reading Success*, and UFLI Foundations further strengthened the school's ability to identify foundational literacy needs and provide targeted instruction.

Through universal screening, early intervention, individualized instruction, and progress monitoring, SRMCS works to ensure students receive the academic support necessary to succeed.

Student Achievement and Instructional Effectiveness
Student achievement data are used to evaluate instructional effectiveness and guide continuous improvement.

During FY2025–26, FastBridge results demonstrated positive outcomes in reading and mathematics. In reading, 65.1% of students in grades K–1 and 73.1% of students in grades 2–6 met the school's established performance criteria. Mathematics results indicated that 61.3% of students in grades K–1 and 69.7% of students in grades 2–6 met the established criteria.

On statewide assessments, SRMCS achieved reading proficiency of 59.4%, compared to 46.2% statewide, and mathematics proficiency of 47.7%, compared to 42.2% statewide.

Students eligible for free or reduced-price lunch achieved 60.0% reading proficiency, compared to 31.6% statewide. Mathematics proficiency for this student group was 26.3%, compared to 26.1% statewide. Science results for this subgroup were not reportable due to insufficient student numbers.

These outcomes, combined with intervention participation and progress-monitoring data, inform decisions regarding instructional materials, supplemental services, professional development, and future curriculum improvements.

English Language Development
SRMCS is committed to ensuring that students developing English language proficiency have equitable access to grade-level curriculum and appropriate instructional support.

The school uses a home language questionnaire during enrollment to identify students who may require English language development services. Students identified as potentially eligible are referred for additional screening and support consistent with applicable state requirements.
During FY2025–26, SRMCS did not have any students identified as English learners.

If English learners enroll in future years, the school will provide appropriate language proficiency screening, English language development instruction, and instructional accommodations based on individual student needs.

The Montessori approach supports language development through oral communication, vocabulary instruction, hands-on materials, individualized instruction, and peer interaction. SRMCS recognizes the importance of students' home languages and cultural backgrounds and will collaborate with families to support language development.

Improving Academic Achievement of English Learners
Although SRMCS did not enroll any identified English learners during FY2025–26, the school maintains procedures for identifying and supporting students who may require English language development services.

When English learners enroll, SRMCS will use appropriate language proficiency assessments, classroom performance data, and academic screening results to identify instructional needs and monitor progress.

English learners will have access to grade-level academic content, differentiated instruction, language development supports, and additional academic interventions when appropriate. Teachers and support staff will collaborate to ensure language development needs are considered when planning instruction and evaluating student progress.
The school will review English learner academic achievement and language development data as part of its broader continuous improvement process when applicable.

Long-Term Strategic Improvement
SRMCS's long-term instructional improvement priorities include strengthening evidence-based literacy instruction, improving science and writing achievement, increasing academic proficiency, reducing achievement gaps, and ensuring equitable access to high-quality instruction.
The school will continue using student assessment results, classroom observations, teacher evaluations, professional collaboration, curriculum reviews, and RTI progress-monitoring data to guide instructional decisions.

FY2025–26 intervention data demonstrate the school's ongoing commitment to providing targeted academic support and monitoring student outcomes. By tracking students who successfully graduate from interventions separately from those transitioning to special education or continuing academic support, SRMCS can more effectively evaluate intervention effectiveness and identify opportunities for improvement.

Through its Montessori educational model, RTI framework, specialized academic interventions, and commitment to evidence-based instruction, SRMCS strives to ensure that all students receive individualized academic support and opportunities for success.
These coordinated efforts support the school's commitment to improving teaching and learning while preparing students for continued academic achievement, lifelong learning, and meaningful civic participation.

Equitable Teacher Distribution & Access to Diverse Teachers

Swan River Montessori Charter School (SRMCS) is committed to ensuring that all students have equitable access to qualified, experienced, and effective teachers. In accordance with Minnesota Statutes §120B.11, subdivision 2(a)(5), the school incorporates equitable teacher distribution into its Comprehensive Achievement and Civic Readiness (CACR) Strategic Plan. This commitment includes ensuring that students from low-income families, students of color, and American Indian students are not disproportionately taught by inexperienced, ineffective, or out-of-field teachers.

Process for Examining Equitable Teacher Distribution
As a small public charter Montessori school serving kindergarten through sixth grade, SRMCS provides students with access to qualified teachers through its multi-age classroom structure. The school emphasizes Minnesota teaching licensure, Montessori training, instructional experience, and ongoing professional development when recruiting, assigning, and evaluating teachers.
SRMCS examines equitable teacher distribution by reviewing teacher qualifications, years of teaching experience, licensure assignments, advanced degrees, and racial and ethnic diversity. The Executive Director oversees staffing assignments and evaluates whether students across classrooms and grade levels have comparable access to qualified and effective instruction.

The school also reviews student achievement data, classroom observations, and intervention needs to identify potential differences in educational opportunities. This process supports informed decisions regarding teacher assignments, professional development, and additional instructional support.

Strategies to Ensure Equitable Access to Effective Teachers
SRMCS employs several strategies to promote equitable access to qualified and effective educators.

- **Teacher Qualifications:** The school prioritizes hiring teachers who hold appropriate Minnesota teaching licenses and have Montessori training or certification aligned with their instructional responsibilities.
- **Equitable Classroom Assignments:** Teacher assignments are reviewed to ensure that students from low-income families, students of color, and American Indian students have comparable access to experienced, qualified, and effective teachers.
- **Professional Development:** Teachers participate in professional learning focused on Montessori instruction, Minnesota Academic Standards, evidence-based literacy practices, differentiated instruction, and meeting diverse student needs.
- **Instructional Monitoring:** The Executive Director conducts monthly classroom walkthroughs, meets individually with staff twice annually, and completes annual teacher evaluations using the Danielson Framework for Teaching.
- **Targeted Academic Support:** Students requiring additional instruction have access to Response to Intervention (RTI), Math Corps, Reading Corps, and special education services when appropriate. These supports supplement classroom instruction and help address individual learning needs.
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Through these practices, SRMCS seeks to prevent disproportionate assignment of inexperienced, ineffective, or out-of-field teachers to historically underserved student groups.

Access to Racially and Ethnically Diverse Teachers
SRMCS recognizes the importance of a diverse educational workforce that reflects a variety of cultural backgrounds, perspectives, and experiences.

As a small charter school located in greater Minnesota, SRMCS faces challenges in recruiting racially and ethnically diverse educators. Nevertheless, the school remains committed to inclusive recruitment practices and considers opportunities to increase staff diversity when filling vacancies.

During FY2025–26, SRMCS employed 30 staff members, including 12 licensed staff members and seven lead classroom teachers. Two of the 30 employees (6.7%) identified as racially or ethnically diverse. Among licensed staff, one of 12 employees (8.3%) identified as racially or ethnically diverse. Among lead classroom teachers, one of seven (14.3%) identified as racially or ethnically diverse.

SRMCS will continue seeking opportunities to recruit and retain qualified educators from diverse backgrounds while maintaining its commitment to Minnesota licensure requirements, Montessori training, and effective instructional practices.

Teacher Equity Categories	2025-2026 Data
Total number of licensed teachers employed at SRMCS during the 2025-2026 school year: 15	

	Licensed Educators (% of total)	3+ Years' Experience (% of total)	Working in Area of Licensure (% of total)	Advanced Degrees (% of total)	Racially / Ethnically Diverse (% of total)
Teachers	**10 of 15 = 66.6%**	**12 of 15 = 80%**	**9 of 15 = 60%**	**2 of 15 = 13.3%**	**1 of 15 = 6.6%**
Admin Staff	**1 of 1 =100%**	**1 of 1 =100%**	**1 of 1 =100%**	**1 of 1 =100%**	**0 of 1 = 0%**

Assurance of Public Reporting ~ Equitable Access to Effective & Diverse Teachers

Assurance of Public Reporting

SRMCS is committed to transparency and public reporting regarding equitable access to effective and diverse teachers. Information regarding teacher qualifications, experience, licensure, and diversity will be reviewed annually and shared through the school's reporting processes.

This information will be made available through the following:

1. **SRMCS Comprehensive Achievement and Civic Readiness Annual Report:** The report is reviewed and approved by the SRMCS Board of Directors, submitted to the school's authorizer, Osprey Wilds, and posted on the school's website.

2. **Minnesota Department of Education Reporting:** The school completes applicable annual reporting requirements regarding student achievement, teacher qualifications, and equitable educational opportunities.

3. **Equitable Access to Effective and Diverse Teachers:** The school maintains and updates information regarding equitable teacher distribution and makes it publicly available through its website.

Long-Term Strategic Improvement

SRMCS will continue examining teacher qualifications, licensure, experience, professional effectiveness, and staff diversity as part of its long-term strategic planning process.

The school will use this information, together with student demographic data, academic achievement results, and classroom observations, to evaluate whether students have equitable access to effective instruction.

Future improvement efforts will focus on strengthening recruitment and retention, supporting Montessori training and professional development, monitoring teacher assignments, and identifying opportunities to increase workforce diversity.

Through these efforts, SRMCS remains committed to ensuring that all students, regardless of socioeconomic status, race, ethnicity, or background, have access to qualified teachers and high-quality Montessori education.

Every Student Succeeds Act (ESSA) School Identification

Under ESSA, the Minnesota Department of Education has identified schools that will receive comprehensive supports or additional targeted support for the 2025-2026 school year. Swan River Montessori Charter School has been identified as a school requiring additional supports of any kind.

Educational Effectiveness: Assessment and Evaluation

Swan River Montessori Charter School (SRMCS) is committed to providing high-quality instruction and maintaining an inclusive, collaborative educational environment that supports the academic, social, emotional, and developmental needs of all students. In accordance with Minnesota Statutes §120B.11, subdivision 2(a)(6), the school's educational effectiveness practices are aligned with its Comprehensive Achievement and Civic Readiness (CACR) Strategic Plan and its mission to provide an authentic Montessori education.

SRMCS's long-term approach to educational effectiveness emphasizes rigorous academic instruction, individualized learning, culturally responsive practices, professional collaboration, and continuous improvement. Through its Montessori educational model, the school strives to ensure that students develop strong academic skills, critical thinking abilities, independence, respect for others, and the knowledge and skills necessary for lifelong learning and civic participation.

Integration of High-Quality Instruction, Technology, and Culturally Sustaining Curriculum

SRMCS provides high-quality instruction through a Montessori educational approach that emphasizes individualized learning, hands-on experiences, inquiry-based instruction, critical thinking, and problem-solving. Students learn in multi-age classrooms, allowing teachers to develop a comprehensive understanding of individual learning needs and provide instruction based on each student's academic development and demonstrated mastery.

The school's curriculum is aligned with Minnesota Academic Standards and is designed to provide rigorous and developmentally appropriate instruction. Teachers utilize Montessori materials, classroom observations, student work, FastBridge assessments, Minnesota Comprehensive Assessments (MCA), and other assessment tools to evaluate academic progress and guide instructional decisions.

During FY2025–26, SRMCS strengthened foundational literacy instruction through the implementation of the Phonological Awareness Screening Test (PAST), Kilpatrick's *Equipped for Reading Success*, and UFLI Foundations. These instructional resources complement Montessori language instruction and support the school's commitment to evidence-based literacy practices.

Technology is incorporated thoughtfully to enhance research, collaboration, academic skill development, and individualized learning while maintaining the hands-on and experiential nature of Montessori education. Students have opportunities to develop digital literacy skills and use technology as an educational resource to support learning and exploration.

SRMCS is committed to providing a curriculum that is academically rigorous, accurate, antiracist, and culturally sustaining. Montessori education emphasizes an understanding of the interconnectedness of people, cultures, communities, and the natural world. Through cultural studies, geography, history, science, literature, and classroom discussions, students are introduced to diverse perspectives and encouraged to develop an appreciation for different cultures and experiences.

When reviewing curriculum and instructional materials, SRMCS considers alignment with Minnesota Academic Standards, academic rigor, historical accuracy, and representation of diverse cultures and perspectives. Teachers are encouraged to identify materials that may contain stereotypes, bias, or limited perspectives and incorporate additional resources that provide students with a more complete understanding of historical events, communities, and cultural experiences.

These practices support a culturally sustaining educational environment in which students can see their identities and experiences reflected in their learning while gaining an understanding and appreciation of perspectives different from their own.

Through this approach, SRMCS seeks to develop academically prepared students who are thoughtful, informed, respectful, and responsible members of society.

Learning and Work Environments That Affirm Cultural and Community Strengths
SRMCS is committed to maintaining a welcoming and inclusive learning and work environment that validates, affirms, embraces, and integrates the cultural and community strengths of students, families, and employees.

The Montessori philosophy emphasizes respect for the individual, appreciation of human diversity, peaceful conflict resolution, collaboration, and personal responsibility. These principles are incorporated into the daily classroom environment and interactions among students and staff.

Students are encouraged to share their perspectives, learn about different cultures, and develop an understanding of the experiences and contributions of others. Classroom lessons and activities provide opportunities to explore cultural traditions, geographic regions, historical events, and connections among communities throughout the world.

The school's multi-age classroom structure promotes collaboration, peer mentoring, and respect for individual differences. Older students develop leadership and responsibility by supporting younger classmates, while younger students benefit from observing and working alongside more experienced peers. This structure encourages relationships built on cooperation, empathy, and mutual respect.

SRMCS recognizes families as essential partners in the educational process. The school encourages family participation through parent-teacher conferences, classroom volunteering, school events, parent education opportunities, and ongoing communication between families and school staff.

These partnerships provide opportunities for families to share their experiences, perspectives, and knowledge while strengthening connections between the school and the communities it serves. Family involvement also allows teachers to develop a better understanding of individual students and the cultural, social, and community experiences that influence their learning.
The school also strives to ensure that employees feel respected, supported, and valued. Staff members are encouraged to share professional perspectives, collaborate on instructional decisions, and contribute to a positive school culture.

SRMCS recognizes that an inclusive learning and work environment requires ongoing reflection and communication. School leadership and staff work collaboratively to address concerns, strengthen relationships, and maintain a school community where individuals are treated with dignity and respect.

Through its Montessori philosophy, family partnerships, and commitment to inclusive practices, SRMCS works to create an environment in which students, families, and employees experience a sense of belonging, mutual respect, and shared responsibility for student success.

Collaborative Professional Culture, Teacher Retention, and Instructional Effectiveness
SRMCS recognizes that a collaborative and supportive professional culture is essential to retaining qualified educators, improving instructional effectiveness, and meeting the diverse needs of students.

The school promotes professional collaboration through staff meetings, professional development, instructional planning, classroom observations, and opportunities for teachers to discuss student achievement and instructional practices.

Teachers and support staff work collaboratively to review assessment results, identify academic needs, share instructional strategies, and determine appropriate interventions. This collaboration includes classroom teachers, instructional assistants, special education personnel, and academic intervention specialists.
During FY2025–26, professional learning priorities included strengthening evidence-based literacy instruction, integrating Science of Reading practices with Montessori methodology, and improving instructional approaches for students requiring additional academic support.

SRMCS supports teacher retention through professional collaboration, ongoing communication with administration, instructional mentoring, and opportunities for professional development. New employees receive guidance regarding Montessori classroom practices, instructional expectations, and school procedures. Experienced staff members provide support to new teachers through collaboration, modeling, and sharing instructional resources.

The Executive Director conducts monthly classroom walkthroughs to monitor instructional practices, student engagement, classroom environments, and implementation of Montessori principles. These walkthroughs provide opportunities to recognize instructional strengths and identify areas where additional professional support may be beneficial.

Staff members meet individually with the Executive Director twice annually to discuss instructional effectiveness, professional goals, challenges, and areas for continued development. These meetings provide opportunities for staff to communicate concerns, identify needed resources, and receive individualized professional support.

Teachers receive one final annual evaluation using the Danielson Framework for Teaching, which provides a structured process for examining instructional planning, classroom environments, instructional delivery, and professional responsibilities.

Together, these practices support constructive feedback, professional reflection, continuous improvement, and a collaborative work environment where educators are encouraged to develop and remain in the profession.

SRMCS also recognizes the importance of recruiting and retaining qualified, racially and ethnically diverse educators who are effective in working with students from varied backgrounds.

As a small charter school located in greater Minnesota, SRMCS recognizes the challenges associated with recruiting and retaining a diverse educational workforce. The school remains committed to inclusive hiring practices, professional growth opportunities, and a collaborative work environment that supports qualified educators from varied backgrounds.

The school recognizes that workforce diversity contributes valuable perspectives and experiences to the educational environment. SRMCS will continue seeking opportunities to recruit and retain qualified educators from diverse backgrounds while supporting all employees through professional development, collaborative planning, instructional coaching, and opportunities for professional growth.

Detailed staff diversity and teacher qualification data are provided in Section D of this report. By maintaining high expectations for instructional quality and providing ongoing professional support, SRMCS seeks to build a stable, effective, and inclusive educational team capable of meeting the needs of all students.

Continuous Improvement and Long-Term Strategic Planning

SRMCS evaluates its educational effectiveness practices through ongoing review of student achievement results, classroom observations, teacher evaluations, curriculum implementation, professional development priorities, and feedback from the school community.

The school's comprehensive, long-term strategic planning process emphasizes continuous improvement in academic achievement, instructional quality, equitable educational opportunities, and student engagement.

Assessment data from FastBridge, MCA, PAST, classroom assessments, and intervention progress monitoring are used to identify instructional strengths and areas requiring improvement. Teachers and administrators review this information to guide curriculum decisions, professional development, and instructional support.

When assessment results, classroom observations, or staff feedback identify an instructional concern, school leadership and teaching staff review the available information, examine current instructional practices, and consider adjustments to curriculum, instructional materials, or professional development.

The school's curriculum review process involves identifying specific instructional needs, evaluating the effectiveness of existing practices, researching alternative resources or instructional approaches, and discussing potential improvements collaboratively. Following implementation of instructional changes, staff review student progress and instructional effectiveness to determine whether additional adjustments are necessary.

This ongoing process ensures that curriculum and instructional decisions are informed by student needs, professional expertise, and evidence of academic progress.

The school also examines the effectiveness of instructional practices through its Response to Intervention (RTI) framework, which provides targeted academic assistance to students who require additional support in reading and mathematics.

Looking ahead, SRMCS will continue prioritizing evidence-based literacy instruction, rigorous mathematics education, culturally sustaining curriculum, professional collaboration, and equitable access to qualified teachers.

The school will also continue reviewing instructional materials and educational practices to ensure they reflect diverse perspectives, support academic achievement, and promote an inclusive school environment.

Through its Montessori educational philosophy, commitment to professional excellence, and ongoing evaluation of instructional practices, Swan River Montessori Charter School strives to provide an educational experience that supports the growth of the whole child and prepares students for academic success, lifelong learning, and meaningful civic participation.

Student & Parent Satisfaction

Swan River Montessori Charter School (SRMCS) values student and family feedback as an important component of its continuous improvement process. In accordance with Minnesota Statutes §120B.11, subdivision 7, and the Osprey Wilds Operations Performance Evaluation Framework, SRMCS collects and reviews survey data regarding student and parent satisfaction with the educational program, perceptions of school safety, and connection to the school community.

During FY2025–26, SRMCS collected 116 student surveys and administered winter and spring family satisfaction surveys, with 43 responses received during each survey period. Results are used to identify strengths, evaluate areas of concern, and guide improvements to the overall school experience.

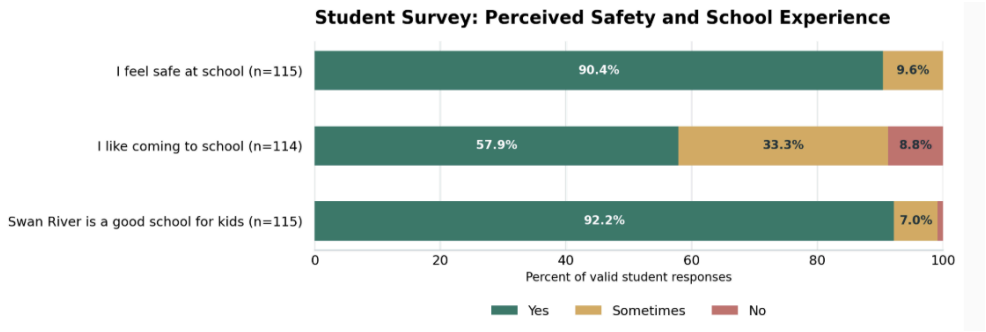
Student Perceptions of Safety and Satisfaction
The student survey measured school safety, teacher relationships, engagement, belonging, and overall satisfaction. Students responded using three choices: Yes, Sometimes, or No.

Table 10.1. FY2025–26 Student Survey Results

Survey Statement	Yes	Sometimes	No
I feel safe at school	90.4%	9.6%	0.0%
I like coming to school	57.9%	33.3%	8.8%
Swan River is a good school for kids	92.2%	7.0%	0.9%

Percentages are based on valid responses to each question.

Figure 10.1. Student Survey: Perceived Safety and School Experience



Student survey results indicate positive perceptions of SRMCS. Of the students responding to the safety question, 90.4% indicated that they feel safe at school, while 9.6% reported feeling safe sometimes. No students selected No.

Overall satisfaction with the school was also positive, with 92.2% of students agreeing that Swan River is a good school for kids. However, responses regarding daily school enjoyment were more varied. While 57.9% reported that they like coming to school, 33.3% selected Sometimes and 8.8% selected No.

These findings suggest that students generally view SRMCS favorably while identifying an opportunity to strengthen daily engagement and enjoyment of school.

Written student responses highlighted friendships, supportive teachers, recess, art, music, physical education, and hands-on learning as valued aspects of the school experience. Students also expressed interest in additional outdoor activities, recess time, enrichment opportunities, and positive interactions with peers.

SRMCS recognizes the importance of providing a school environment where students consistently feel safe, included, supported, and engaged in meaningful learning experiences.

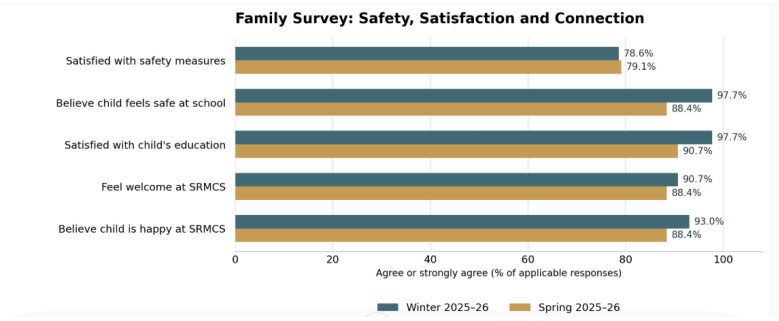
SRMCS administered family satisfaction surveys during the winter and spring of FY2025–26. The surveys collected feedback regarding the school environment, educational program, classroom instruction, communication, student well-being, and school operations.

Table 10.2. FY2025–26 Parent Satisfaction Survey Results

Survey Measure	Winter 2025–26	Spring 2025–26
Satisfied with school safety measures	78.6%	79.1%
Believe their child feels safe at school	97.7%	88.4%
Satisfied with their child's education	97.7%	90.7%
Believe their child is happy at SRMCS	93.0%	88.4%
Feel welcome at SRMCS	90.7%	88.4%

Percentages represent respondents selecting Agree or Strongly Agree. Each survey received 43 responses. One Not Applicable response was excluded from the winter safety-measures calculation.

Figure 10.2. Parent Survey: Safety, Satisfaction, and School Connection



Parent Perceptions of Safety
Parent perceptions of school safety were generally positive. During the winter survey, 97.7% of respondents indicated that their child felt safe at school, compared with 88.4% in the spring. Satisfaction with school safety measures remained relatively consistent, increasing slightly from 78.6% in winter to 79.1% in spring.

Although most parents believe their children feel safe, the results indicate that some families have concerns regarding the school's safety measures. Written feedback identified opportunities to review building access, entrance security, and communication regarding school safety procedures.

SRMCS will continue evaluating safety practices and identifying opportunities to strengthen the physical and emotional security of students.

Parent Satisfaction With the Educational Program
Parent satisfaction with the educational program remained high throughout FY2025–26. In winter, 97.7% of respondents expressed satisfaction with their child's education, compared with 90.7% in spring.

Similarly, 93.0% of winter respondents and 88.4% of spring respondents indicated that their child was happy at SRMCS.

These findings reflect continued family support for the school's Montessori educational model, individualized instruction, and student-centered learning environment. While satisfaction remained high, the spring results indicate opportunities to better understand and respond to family concerns.

Because the surveys were anonymous, changes between winter and spring results cannot be attributed to changes in the opinions of the same individual families.

Student and Family Connection to the School Community
SRMCS recognizes that positive relationships among students, teachers, staff, and families are essential to student success and school satisfaction.

Family survey results indicated that 90.7% of winter respondents and 88.4% of spring respondents felt welcome at SRMCS.

Written family feedback identified small class sizes, personalized instruction, caring and dedicated teachers, hands-on learning, and a close-knit school community as important strengths. Student responses similarly emphasized friendships, relationships with teachers, opportunities for independence, and engaging classroom experiences.

Together, these findings highlight the importance of maintaining a welcoming school culture where students and families feel respected, valued, and connected.

Using Survey Results for Continuous Improvement
SRMCS uses student and parent satisfaction data to evaluate educational effectiveness, identify emerging concerns, and guide school improvement efforts.
School administration reviews survey results and written feedback to identify recurring themes and determine priorities for instructional practices, student support, communication, safety procedures, and school operations.

Based on the FY2025–26 survey findings, SRMCS has identified several areas for continued attention, including strengthening students' daily enjoyment of school, supporting positive peer relationships, reviewing safety and entrance procedures, maintaining clear family communication, and evaluating opportunities for outdoor activities and enrichment.
The school will continue monitoring student perceptions of safety and engagement, with particular attention to students who indicate they only sometimes feel safe or enjoy attending school.

Survey results will also inform discussions among school administration, teachers, and the Board of Directors as SRMCS evaluates improvement priorities and available resources.

At the same time, the school will continue building upon the strengths consistently recognized by students and families, including individualized Montessori instruction, strong teacher-student relationships, hands-on learning, and a welcoming school community.

Through ongoing collection and review of student and parent feedback, SRMCS remains committed to providing a safe, supportive, and engaging educational environment that promotes student achievement, family satisfaction, and a strong sense of belonging.

Environmental Education Implementation & Evaluation Plan

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

The Osprey Wilds defines environmental education as the implementation of values and strategies that foster learning and create environmentally literate citizens who engage in creating healthy outcomes for individuals, communities, and the Earth. The overarching goal of environmental education is an environmentally literate citizenry. The test of environmental literacy is the capacity of an individual to work individually and collectively toward sustaining a healthy natural environment. This requires sufficient awareness, knowledge, skills, and attitudes in order to create a healthy planet where all people live in balance with the Earth.

As part of our contract with our authorizer, Osprey Wilds, we have agreed to the following environmental education goal:

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

Our Approach to Environmental Education



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

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

1. Use of local surroundings. Our staff ensures that students are exposed to the outdoor environment frequently during the school day making learning immediate and meaningful. Looking at nature from a window or in a picture is not nearly as effective as physically being surrounded by it.
2. Provision of hands-on experiences. Students are encouraged as much as possible to use scientific tools such as binoculars, magnifying glasses, and journals to observe and manipulate nature up close and first-hand.
3. Implementation of cross-subject instruction. Environmental education goes far beyond the single subject of science. Montessori education does a wonderful job integrating EE/science topics across many subject areas, particularly in language/writing, history, cultural studies, and art. This is done all the time in our classrooms.
4. Focusing on topics based on real-time events and issues. We have found that our students are far more likely to actively engage when an issue is affecting the world here and now. The younger students often struggle with understanding abstract timelines so providing information in real-time has equated to greater interest.

The Environmental Literacy of Our Students: Data Collection & Analyzation

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

Environmental Education Successes & Challenges of the School Year

Successes:

- The creation of an EE plan in conjunction with OW that helps stay on course improving our overall EE efforts. Specifically, this plan ensures that we are executing and tracking specific EE literacy data with students.
- Making progress on our natural playground initiative getting our students back to playing with nature using pure imagination.
- A school board that continues to support the employment of an EE teacher.
- Staff who believe in the importance of EE and models this daily for our students.
- Involving our parents as volunteers to further our EE efforts.
- Receiving donations from our families and the PTO to support EE efforts.
- Having an active EE committee that meets at least monthly to keep the school progressing with EE goals.

Challenges:

- Finding ways to educate/train our staff to further our EE efforts that are affordable and accessible. Inviting speakers to come onsite is ideal so all staff can participate, but these opportunities are very limited.
- Lack of community resources to carry out some of the goals such as school-wide composting of food scraps and lunch trays. There is no compost pick up available in this area even though we would love to see less waste go in the trash from lunch. Some classroom teachers and staff take home the food scraps to compost (or feed livestock), but this is not an option for all classrooms and puts the burden on the staff member.
- Trying to be innovative on a continuing basis.

Application of Environmental Education Values & Strategies

Environmental education is far greater than students participating in activities outdoors. While it has taken some time, our staff has come to realize that to make a true impact on our students and on the earth, we must go back to our roots. Montessori education teaches to the whole child – body, mind and spirit. Environmental education should be no different in that it, too, requires a holistic approach. Given the age of our students (3 through 12) it is largely the responsibility of adults to guide the child with moral and ethical development. It is during this stage that children are beginning to develop reasoning skills and formulate belief systems.

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



Governance and Management

2025-2026 SRMCS Board of Directors

MEMBER NAME	BOARD POSITION	AFFILIATION	DATE ELECTED	DATE SEATED	TERM END DATE	PHONE NUMBER	EMAIL ADDRESS
Jana Evink	Chair	Parent	1/2023	1/2023	6/2026	763-271-7926	janae@swanrivermontessori.org
Amy Jensen	Secretary	Teacher	05/2017	07/2017	06/2026	763-271-7926	amyj@swanrivermontessori.org
Amy Savage	Treasurer	Teacher	05/2017	07/2017	06/2026	763-271-7926	amys@swanrivermontessori.or
Julie Halvorson	Member	Teacher	05/2022	07/2022	06/2025	763-271-7926	julieh@swanrivermontessori.org
Nicole Perez	Member	Teacher	5/2022	07/2022	06/2025	763-271-7926	nicolep@swanrivermontessori.org
Claire Belknap	Member	Parent	12/2023	01/2024	06/2027	763-271-7926	claireb@swanrivermontessori.org
Rick Freese	Member	Community	8/2022	8/2022	06/2026	763-271-7926	rickf@swanrivermontessori.org
Annette Vemuri	Ex-Officio	School Leader	-	-	-	763-271-7926	director@swanrivermontessori.org

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

The Board of Directors: Governance

The SRMCS Board of Directors strives to not only meet, but to exceed standards and expectations of typical school boards. Meetings are typically held the third Tuesday of each month, with the exception of July. Board packets are distributed by the School Director approximately one week prior to each meeting. These packets include the monthly financial statements as provided by our finance manager, student enrollment data, donations received, and any new and old business that is up for discussion or review. Meeting agendas are posted on the doors of the school and placed on the school website for public viewing. Meeting minutes are also posted to the web site once approved by the Board. Approved policies, reports, and other related materials are also placed on the web site for the general public.

Board Training and Development

Swan River Montessori Charter School (SRMCS) is committed to ongoing board training and professional development to support effective governance, accountability, and compliance with Minnesota charter school requirements. The board utilizes training opportunities and resources provided by Osprey Wilds, board self-evaluations, and collaborative discussions to strengthen its governance practices.

During FY26, the board completed three training topics focused on data practices and open meeting requirements, academic oversight, and effective board meeting documentation. Board members also conducted a self-evaluation to identify areas for continued improvement. Training information was shared and discussed during board meetings to promote collective learning and strengthen board effectiveness.

Initial Training

SRMCS recognizes the importance of ensuring that board members complete the initial training required under Minnesota charter school law. These training requirements address board roles and responsibilities, Open Meeting Law, Data Practices Law, oversight of student achievement, employment policies and practices, and public school funding and financial management.

The following tables document the required initial training categories for each board member. Completion dates and training providers will be added following verification of individual training records.

Board of Directors Training Information: Initial

Board Member Name	Original Date Seated	Board's Role & Responsibilities	Employment Policies & Practices	Financial Management
Rick Freese	08/22	2/23 Charter School Board Roles and Responsibilities (OW training materials)	2/23 Open Meeting Law and You Understanding the authorizer-school relationship (OW training materials)	2/23 Financial Management 101 (OW training materials)

Julie Halvorson	07/2022	8/2/23 Charter School Board Roles and Responsibilities (OW training materials)	8/23 Open Meeting Law and You Understanding the authorizer-school relationship (OW training materials)	8/23 Financial Management 101 (OW training materials)
Jana Evink	12/2022	2/24 Charter School Board Roles and Responsibilities	2/24 Charter School Employment Policies and Practices	2/24 Charter School Financial Management 101
Amy Savage	06/2023	8/2/23 Charter School Board Roles and Responsibilities (OW training materials	8/2/23 Open Meeting Law and You Understanding the authorizer-school relationship (OW training materials)	2/23 Charter School Financial Management 101
Amy Jensen	07/21	08/03/21 Board Roles & Responsibilities	08/03/21 Employee Policies & Practices	08/03/21 Financial Management 101
Nicole Perez	07/22	08/22 Board Roles & Responsibilities	08/22 Employee Policies & Practices	08/22 Financial Management 101
Claire Belknap	01/24	02/24 Board Roles & Responsibilities	02/24 Employee Policies & Practices	02/24 Financial Management 101

Annual Assessment of Training Needs
Assessment Date: November 18, 2025
During FY26, the SRMCS Board conducted a board self-evaluation using the evaluation tool provided by Osprey Wilds. The evaluation was completed during the November 18, 2025, board meeting and provided an opportunity to review governance practices and identify areas for continued improvement.

Through this process, the board identified the need to strengthen academic and environmental education oversight, further develop the director evaluation process, and incorporate regular board training discussions into meetings.

In response, the board established a schedule to review academic and environmental education performance four times annually. The board also identified the need to further develop director evaluation goals and procedures aligned with schoolwide academic outcomes.

The board's approach to determining training needs includes self-evaluation, review of governance responsibilities, consideration of recommendations from Osprey Wilds, and discussion of professional development resources. Individual board members share information

gained through training with the full board, allowing members to strengthen their collective understanding of governance responsibilities. Training discussions also provide opportunities to identify areas for additional learning related to individual board roles and responsibilities.

Annual Training
During FY26, the SRMCS Board participated in three training topics focused on legal compliance, academic accountability, and effective governance.
Training 1: Data Practices and Open Meeting Law
Date: November 18, 2025
Presenter: Jana Evink, Board Chair
Training Source: Osprey Wilds Board Training
Board Chair Jana Evink shared information from an Osprey Wilds training she attended regarding Minnesota's Data Practices Law and Open Meeting Law.
Topics included procedures for public data requests, policies regarding unclaimed requested records, public comment procedures, board quorum considerations, and requirements for remote board participation.
The discussion helped strengthen board members' understanding of legal responsibilities, transparency, and appropriate board governance procedures.

Training 2: Board Oversight of Academic Outcomes
Date: November 18, 2025
Presenter: Amy Jensen, Board Secretary
Training Source: Osprey Wilds Sounding Board, October 2025
Amy Jensen presented the Osprey Wilds Sounding Board training resource, *Board Oversight of Academic Outcomes*, which focused on the board's responsibility to monitor academic performance and ensure progress toward the academic goals established in the school's charter contract.

The training emphasized the importance of reviewing academic performance data at least four times annually, understanding contractual academic goals, interpreting student achievement measures, and using performance results to guide decision-making. The resource also addressed the relationship between academic outcomes, charter contract renewal, and the director evaluation process.

Following the review, the board established a schedule for monitoring academic achievement and environmental education goals throughout the school year. This included reviewing MCA results, fall and winter FastBridge assessments, spring academic performance data, and environmental education progress.

The training strengthened the board's understanding of academic accountability and established a more consistent approach to monitoring student achievement and school performance.

Training 3: Board Meeting Minutes — Clear, Useful, and Transparent
Date: March 17, 2026
Training Source: Osprey Wilds Sounding Board, January 2026
Training Format: Board review and discussion of Osprey Wilds training resource

The board reviewed the Osprey Wilds publication *Board Meeting Minutes: Clear, Useful, and Transparent*, which emphasized the importance of accurate, complete, and transparent board meeting documentation.

During the training discussion, the board identified opportunities to improve the quality of its meeting minutes. The board secretary recorded recommendations to provide more detailed narratives of board discussions, particularly regarding financial reports and the review of bills. The board also incorporated approval of expenditures and disbursements into its financial approval motions. These improvements were intended to strengthen financial oversight, transparency, and accountability in board decision-making.

Individual Board Member Training Participation — FY26

Board Member	Training 1: Data Practices & Open Meeting Law (11/18/25)	Training 2: Academic Outcomes (11/18/25)	Training 3: Board Meeting Minutes (3/17/26)
Jana Evink	Yes	Yes	Yes
Julie Halvorson	Yes	Yes	Yes
Amy Savage	Yes	Yes	Yes
Claire Belknap	Yes	Yes	Yes
Nicole Perez	Yes	Yes	Yes
Amy Jensen	Yes	Yes	Yes
Rick Freese	Yes	Yes	No

Annual Assessment of the Board's Performance
Date of Evaluation: November 18, 2025
The SRMCS Board completed its annual performance evaluation on November 18, 2025, using the board self-evaluation tool provided by Osprey Wilds. The evaluation provided an opportunity for the board to assess its governance practices, review its oversight responsibilities, and identify areas for continued improvement.

The board identified three primary improvement priorities: strengthening academic and environmental education oversight, improving director evaluation procedures, and incorporating regular board training into meetings.

As a result, the board established a quarterly schedule for reviewing academic and environmental education outcomes. The board also identified the need to further develop director performance goals aligned with schoolwide academic outcomes and emphasized the importance of ongoing professional development.

The evaluation identified specific areas for improvement and resulted in actions intended to strengthen governance effectiveness. The board's work during FY26 reflects its continued

commitment to accountability, student achievement, and effective oversight of the school's educational program.

Management

Swan River School Management Overview

Swan River School operates under a structured management system that ensures effective leadership and operational efficiency. The School Board serves as the governing body, setting policies, overseeing financial decisions, and guiding the school's overall direction. The Director, who reports directly to the School Board, is responsible for all administrative, academic, and operational functions of the school.
Under the Director's leadership, key roles include:

- Operations Manager – Oversees non-academic functions, including facilities, transportation, food services, and overall school logistics.
- Teachers – Deliver educational instruction and contribute to student development.
- Support Staff (Office Staff, Paraprofessionals, Assistants, Counselors, etc.) – Provide essential assistance to students, teachers, and administrative operations.
- Operational Staff (Cafeteria, Maintenance, Transportation, etc.) – Ensure the school's daily support functions run smoothly.

Key Successes

Swan River Montessori Charter School experienced several significant successes during the 2025–2026 school year.

- **Five-Year Charter Renewal:** One of our greatest accomplishments was receiving approval for a new five-year charter contract with Osprey Wilds. The renewal recognized our continued academic progress, strong financial performance, and improvement in environmental education outcomes throughout the previous contract period.
- **Enrollment Growth and Student Attendance:** Enrollment increased from 164 students in FY25 to 171 students in FY26. Student attendance remained strong at 94.1%, demonstrating continued family commitment to our school community.
- **Academic Achievement:** SRMCS continued to demonstrate strong academic performance in reading and mathematics. In 2026, reading proficiency was 59.4%, compared to the state average of 46.2%. Mathematics proficiency increased from 42.7% in 2025 to 47.7% in 2026, exceeding the state average of 42.2%. These results reflect the dedication of our teachers and the continued emphasis on individualized instruction.
- **Montessori Education and Student Development:** Our school continued to demonstrate success in supporting the whole child through Montessori education. Students achieved an average score of 12.5 out of 16 on the Montessori Planes of Development assessment, meeting our contractual goal of 12. This assessment measures independence, normalization, social-emotional well-being, and community engagement.
- **Professional Development and Student Support:** Staff continued professional development in the Science of Reading while providing individualized instruction and academic interventions to students needing additional support. The school also

established a mathematics standards team to support curriculum alignment and instructional improvement.

- **Financial Stability and Governance:** SRMCS maintained a strong financial position while navigating increasing operational costs. The board also strengthened its oversight practices by establishing regular reviews of academic and environmental education goals and continuing professional development in effective school governance.

Key Challenges & Addressing Those Challenges

Along with our successes, SRMCS continues to identify opportunities for improvement. The following challenges were identified during FY26, along with actions taken or planned to address them.

- **Improving Science Achievement:** Fifth-grade science proficiency remains an area of concern. In 2026, 20% of students demonstrated proficiency, compared to 25.9% statewide. Improving science instruction and achievement will be a priority as we review curriculum alignment, instructional practices, and student learning outcomes.
- **Strengthening Academic Growth and Curriculum Alignment:** Although our reading and mathematics results remain encouraging, we continue to work toward consistent academic growth for all students. Writing growth was 86.2%, below our contractual target of 90%. To strengthen instruction, we formed a mathematics standards team and began planning for increased teacher collaboration and alignment with Minnesota's updated academic standards.
- **Student Retention and Mobility:** Although overall enrollment increased, student mobility rose from 1.8% in FY25 to 8.1% in FY26. We continue to focus on maintaining strong relationships with families, understanding reasons for student transfers, and supporting students and families throughout their Montessori educational experience.
- **Staffing and Financial Constraints:** Increasing operational costs and the need to provide competitive staff compensation continue to present challenges. The board reviewed salary comparisons with surrounding districts and explored budget priorities to support staff recruitment and retention while maintaining our commitment to small classrooms, individualized instruction, and a high-quality Montessori education.

Despite these challenges, SRMCS remains committed to continuous improvement, academic excellence, and providing a nurturing Montessori environment where every student has the opportunity to succeed.

List of Administrators & Qualifications

Name	Title/Position	Primary Responsibilities	Education & Qualifications
Annette Vemuri	School Director	Full school oversight of students, parents, staff, financials, reporting, special education, enrollment, curriculum, and overall success of the school.	B.S. in Human Ecology M.A. in Education and Curriculum and Instruction Principal Licensure - 465733 Admin Montessori Certificate

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

Professional Development Goals for 2025-2026: School Director
Generally speaking, the School Director should receive approximately 25 continuing education hours per year keeping on track for re-licensure every five years. However, there are going to be years where more are earned than others. In FY26, the School Director received 38.25 hours of continuing education. Given that these requirements are often fluid, ongoing professional development is critical to remain in compliance with state and federal mandates.
List of Professional Development in FY24: School Director

Date	Professional Development Title/Topic	Continuing Education Credits Received
9.19.25	**2025 SWM SCHOOL LAW SEMINAR**	7.5
10.3.25	**2025 ANNUAL SCHOOL LAW SEMINAR**	4.75
2.6.26	MAAP conference Training	17
6.15.26	Monthly Montessori Network	9

Total CEUs Earned in FY26: 38.25 Hours

Professional Development Goals/Area of Focus for 2025-26
As is the case for all licensed staff, the School Director will continue to earn continuing education credits to stay on track per licensure renewal requirements. In FY26, specific areas of development will include learning about the science of reading, Montessori education, and the annual OW Leaders Retreat.

Date of School leader Evaluation: June 15, 2026
School Director Performance Evaluation: The School Director is evaluated by each member of the Board of Directors annually per the School Director Performance Evaluation Policy. To assist them with this task, all employees are given the opportunity to submit a survey on the School Director's performance to the board. This feedback is taken into consideration when completing their comprehensive evaluation. Board members are also asked to cite three areas of strength and three areas for improvement/development. Should something need to be directly addressed, the evaluation does include an area to detail an action plan.
Once evaluations are completed by each member, the data is compiled. The Board of Directors then holds a closed session at a board meeting to review the data and discuss any further action, if necessary.

Staffing 2025-2026

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

2025-2026 Licensed Teaching Staff				
Name	**File #**	**License / Assignment**	**2026-27 Status***	**Comments**
Bergquist-Savage, Amy	420388	Kindergarten & EC	R	
Blaha, Ashley	514844	Grades 4 - 5	R	
Dierks, Kimberely	500932	Art (K-6), RTI Math (K-3), Environmental Ed (K-6)	R	
Halvorson, Julie	489613	Kindergarten & EC	R	
Jensen, Amy	390666	Grade 1-3	R	STEM Certified, M.A.
Katke, Sarah	1011968	Special Education	R	Tier II
Lundberg, Jamie	080300	Physical Education	R	Tier I
Melo, Heidi	408124	Grades 4 - 6	R	
Perez, Nicole	398893	Birth to 3rd Grade	R	STEM Certified, M.A.
Ridpath, Pam	1032824	Music/Band	R	Tier I
Schneider, Sharon	283179	Grades 1-3	NR	STEM Certified
Steiskal, Kristen	393211	Special Education	NR	
Sullivan, Brittany	455530	Special Education	R	Special Education Variance

*R = Returning, N = Not returning

2025-2026 Teacher Professional Development Activities

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

SRMCS Professional Development 2025 - 2026					
Title	**Date**	**Presenter**	**Attended By**	**Hours Earned**	**Brief Description**
CPR	8.19.25	Zette Wassen	All Staff	3	Training to help recognize and respond appropriately to cardiac, breathing and first aid emergencies
Bloodborne Pathogens & School Crisis Management, Anti – Bullying, Civil rights, Title 1X, McKinney Vento, Narcan	10.1.25	Annette Vemuri – Self Paced	All Staff	10	Staff learned about bloodborne pathogens and proper use and disposal of PPE
All staff Mandated Reporting/Confidentiality	8.28.25	Katie Zehowski	All Staff	1	Mandated Reporting and Confidentiality training for all staff educates educators on their legal responsibilities to report suspected abuse or neglect while maintaining student confidentiality and ensuring a safe school environment.

Science of Reading training	3.9.26	Kristi Steiskal	All Staff	8	Staff completed Science of Reading training to strengthen evidence-based literacy instruction, develop phonemic awareness and decoding strategies, and improve reading outcomes for all students.



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

Education Effectiveness Practices

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

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

Licensed Teacher Percentage Turnover Rates:

	Total Number of Licensed Teachers	Teachers Not Returning	Turnover Rate
2017-2018	15	1	6.7%
2018-2019	15	0	0%
2019-2020	15	2	13.3%
2020-2021	15	5	33.3%
2021-2022	18	2	11%
2022-2023	16	5	38%
2023-2024	15	4	26.6%
2024-2025	15	0	0%
2025 - 2026	**15**	**2**	**13.3%**

2025-2026 Other Licensed (Non-Teaching) Staff				
Name	**File #**	**License / Assignment**	**2025-2026 Status***	**Comments**
Katie, Zehowski	475996	Special Ed. Director	R	
Emily Boughner	1245609213	Pediatrics Occupational Therapy	R	
Cortney Sears	1045504	Social Worker	R	
Erin Skaff	467733	Speech Pathologist	R	

*R = Returning, N = Not returning

2025-2026 Non-Licensed Staff			
Name	**Assignment**	**2026-27 Status***	**Comments**
Barnes, Patty	Classroom Assistant	R	
Berg, Barb	Program Paraprofessional	R	
Bloomberg, Libby	Program Paraprofessional	R	
Conner, Mylin	Classroom Assistant	R	
Dieterichs, Kayla	Program Paraprofessional	R	
Dehmer, Jean	Program Paraprofessional	R	
Ferrance, Cheyenne	Program Paraprofessional	R	
Foster, Michelle	Classroom Assistant	R	
Hansen, Maddi	Classroom Assistant	R	
Host, Kirsten	Operations Manager	R	
Jordan, Nicole	Program Paraprofessional	R	
Killian, Josie	Program Paraprofessional	R	
Knickerbocker, Sarah	Program Paraprofessional	R	

Larson, Amber	Program Paraprofessional	R	
Paquette, Angela	Program Paraprofessional	R	
Robbinson, Tammy	Program Paraprofessional	R	
Schafer, Brianna	Program Paraprofessional	R	

*R = Returning, N = Not returning

Non-Licensed Staff Members Percentage Turnover Rates:

	Total Number of Non-Licensed Staff	Non-Licensed Staff Not Returning	Turnover Rate
2018-2019	22	4	18.2%
2019-2020	22	1	4.5%
2020-2021	22	6	27.3%
2021-2022	24	13	50%
2022-2023	19	6	31.5%
2023-2024	17	1	5.9%
2024-2025	18	4	22.2%
2025 - 2026	**17**	**0**	**0%**

Operational Performance

Health and Safety

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

- Each door at SRMCS has a coded security panel. Any person who does not have a school-issued code must buzz in manually. A member of the office staff will inquire who the person is via the intercom and will meet that person at the door once access is granted. All family codes are disabled over the summer months and any other days that school is not in session.
- Fire inspections are completed by the Fire Marshall as required.
- Students participate in five fire drills, five lock down drills, and one tornado drill annually.
- The sprinkler system and fire extinguishers are inspected annually.
- Appropriate space is given where required – entryways, exits, 18" of open space from the ceiling, maintenance rooms are orderly and locked at all times when students are present.
- Updated immunization forms are required from all students, including preschoolers.

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

Transportation

Administration keeps in close contact with Hoglund Transportation throughout each year. Any issues that arise regarding our students and provided transportation are dealt with immediately. To ensure the greatest level of safety, all students, including preschoolers, receive bus safety training within the first few weeks of school.

Data Compliance and Reporting

SRMCS prides itself in the prompt submission of any mandated data to the MN Department of Education, the State of MN, our authorizer, and any other external entity we work with. There are staff who are designated for various types of data submissions. Ms. Host, Operational Manager, reports MARSS, CliCs, TRA, and PERA. Ms. Vemuri, School Director, completes and submits all STAR reports, DAC information, lease aid, Local Literacy Plan, the Annual Report, Comprehensive Achievement and Civic Readiness Report and Summaries, and all other data required by external entities.

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

Facilities

SRMCS contracts groundskeeper to care for the grounds and contracts a custodian to take care of the building. Together, all areas are kept clean, orderly, and up to code.

Food Service Programs

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

Due Process and Privacy Rights of Students

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

- Equal Education Opportunity Policy – SRMCS provides equal educational opportunity to all students and does not unlawfully discriminate on the basis of race, color, creed, religion, national origin, sex, marital status, parental status, status with regard to public assistance, disability, sexual orientation or age. The school district also makes reasonable accommodations for students with disabilities.
- Religion and Religious Expression Policies – This policy states that SRMCS shall neither promote nor disparage any religious belief or non-belief. Inclusion of religious music, art, drama, and literature are allowed provided it is intrinsic to the learning experience and is presented in an objective manner without sectarian indoctrination. To the extent possible, special school events shall be conducted at times which are not likely to conflict with observance of religious holidays.
- Protection and Privacy of Pupil Records – SRMCS recognizes its responsibility in regard to the collection, maintenance, and dissemination of pupil records and the protection of the privacy rights of students as provided in federal law and state statutes.

To view these policies in their entirety, please visit our web site at www.swanrivermontessori.org/about-us/school-policies/.

Swan River Montessori Charter School disseminates information about its educational offerings and enrollment procedures through multiple accessible channels to reach families reflective of Minnesota's diverse population. The school shares information on its website, through social media, community postings, local partnerships, and outreach events, ensuring materials clearly explain the Montessori program and enrollment process. Information is written in family-friendly language, and the school works to respond promptly to inquiries and provide assistance as needed. Outreach efforts include connecting with community organizations and early childhood programs to ensure that families from a variety of cultural, linguistic, and socioeconomic backgrounds are aware of the school's opportunities and open enrollment process.

Student Discipline Data

At Swan River, student discipline data is regularly reviewed to ensure a safe, respectful, and supportive learning environment. The school tracks incidents related to behavior, attendance, and student interactions to identify trends and areas for improvement. Discipline data is used to guide decision-making, implement proactive interventions, and support students in developing positive behaviors. The Montessori approach emphasizes conflict resolution, personal responsibility, and community values, encouraging students to learn from their actions. By analyzing this data, Swan River can refine its behavioral support strategies, strengthen social-emotional learning, and foster a positive school culture for all students.

Parent & Community Engagement

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

Hiring Practices

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

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

Background Checks of Employees, Board Members & Volunteers

All adults 18 years of age and older must complete a background check in order to interact with students for any reason during the school day. This includes field trips, classroom celebrations, and general volunteering on school grounds. Employment is always contingent on background check results as is being a member of the Board of Directors. Employees and board members are re-checked every other year while all volunteers are every three years. This is the same cycle that the surrounding school districts use as well. This check is very thorough as it includes state and national registries.

2025–26 School Information Dissemination Activities

Swan River Montessori Charter School (SRMCS) is located in Monticello, Minnesota, within Wright County. The school utilizes multiple outreach methods to share information about its Montessori educational program and open enrollment opportunities with families throughout the community. These efforts are intended to increase awareness of the school's tuition-free public education program and provide accessible enrollment opportunities for families from diverse backgrounds.

Dissemination Activities Log

Method of Dissemination / Event	Date of Activity	Languages Used	Targeted Group Addressed
Facebook posts promoting open enrollment and explaining the application process	December 2025–January 2026	English	General community, including low-income and underrepresented families
Informational flyers distributed throughout the Monticello community	December 2025–January 2026	English	Community families, including low-income families and students of color
Open enrollment flyers displayed at the Monticello Library	December 2025–January 2026	English	Library patrons and community families, including those with limited access to online information
Word-of-mouth communication through current families, staff, and community members	Throughout FY26	English	Prospective families from diverse backgrounds, including those unfamiliar with Montessori education

Dissemination Narrative

Swan River Montessori Charter School is located in Wright County, Minnesota, and serves families in Monticello and surrounding communities. According to U.S. Census Bureau American Community Survey estimates for 2019–2023, Wright County had a population of 145,270 residents. The county's racial and ethnic demographics included 88.9% non-Hispanic White, 3.5% Hispanic or Latino, 3.6% identifying with two or more races, 1.8% Black or African American, 1.5% Asian, and 0.2% American Indian or Alaska Native residents. Approximately 27.5% of county residents were under the age of 18. The median household income was $106,666, with approximately 4.9% of residents living below the poverty level.

Recognizing the diverse backgrounds and economic circumstances of families within Wright County, SRMCS strives to make information about its Montessori educational program and enrollment opportunities widely available.

During the 2025–2026 school year, outreach efforts included Facebook announcements, word-of-mouth communication, and informational flyers distributed throughout the Monticello community, including the Monticello Library. Flyers and Facebook announcements were distributed during late December 2025 and January 2026 to promote the school's open enrollment period.

All printed and online outreach materials were provided in English and included information explaining how families could complete the open enrollment process online or visit the school office to complete an application in person. Offering both application methods provided families with options and helped reduce potential barriers for those who may have limited access to technology or prefer in-person assistance.

The Monticello Library served as an important community location for sharing enrollment information with families beyond the school's existing network. Additionally, word-of-mouth communication through current families, staff, and community members helped increase awareness of the school's educational opportunities.

By utilizing both digital and community-based outreach, SRMCS sought to make enrollment information available to a broad range of families, including low-income households, students of color, students at risk of academic failure, and populations underrepresented in the school community. While these outreach methods were available to the general public rather than directed exclusively toward specific demographic groups, they provided multiple opportunities for families to learn about SRMCS and its enrollment procedures.

SRMCS remains committed to strengthening outreach efforts, expanding awareness of its educational programs, and ensuring equitable access to information about public Montessori education.

Finances

The information presented below is derived from preliminary audit figures. The full financial audit will be completed and presented to the Minnesota Department of Education and Osprey Wilds no later than December 31, 2026.

For questions regarding school finances and for complete financials for 2025-26 and/or an organizational budget for 2026-27, please contact:

Name: Annette Vemuri
Position: School Director

Address: Swan River Montessori Charter School
500 Maple Street
Monticello MN 55362
Phone: 763-271-7926
Email: director@swanrivermontessori.org

Bridget Peterson and Kyle Knudson of EdFin provided financial accounting services for Swan River Montessori Charter School in FY26. This included monthly financials, bank reconciliations, annual budgets and budget revisions, use of SERVS and SEDRA via the Minnesota Department of Education, completion of the school's 990 tax forms, and assistance with the auditing process. ADP provided all payroll services for the school.

FY26 Financial Overview by Fund

FY26 Finances	Fund 1	Fund 2	Fund 4
Total Revenues	2,611,622	104,460	112,090
Total Expenditures	2,453,660	104,602	115,195
Net Income	157,962	3,858	(3,105)
Starting Fund Balance	772,641	0	70,951
Ending Fund Balance	**930,603**	**3,858**	**67,876**

Swan River Montessori Charter School (SRMCS) maintained a strong financial position throughout the 2025–2026 school year. Total revenues across all three funds were $2,828,172, while total expenditures were $2,673,457. The General Fund ended the fiscal year with a surplus of $157,962, increasing its ending fund balance to $930,603.

The school continued to demonstrate responsible fiscal management while supporting its Montessori educational program. Rising personnel costs, special education expenses, and facility operating costs remain ongoing financial challenges. SRMCS continues to prioritize financial stability while maintaining quality educational programming and individualized student support.

Revenues
Total revenues for FY26 were $2,828,172 across the school's three funds.

Fund 1 – General Fund: Total revenues were $2,611,622. The General Fund represents the school's primary source of operating revenue and supports general education, special education, administration, and daily school operations.

Fund 2 – Food Service: Total revenues were $104,460, supporting the school's food service program.

Fund 4 – Community Service: Total revenues were $112,090, supporting the school's Children's House preschool program and extended care services.
SRMCS continues to monitor enrollment and state funding to maintain adequate resources for educational programming and daily operations.

Expenses
Total expenditures for FY26 were $2,673,457 across all three funds.

Fund 1 – General Fund: Total expenditures were $2,453,660. Major expense categories include employee salaries and benefits, special education services, facilities, transportation, instructional materials, and administrative operations.

Fund 2 – Food Service: Total expenditures were $104,602, supporting the operation of the school's food service program.

Fund 4 – Community Service: Total expenditures were $115,195, supporting the Children's House preschool program and extended care services.

Personnel expenses and the costs associated with providing specialized student services continue to represent significant financial responsibilities. The school remains focused on monitoring expenditures and managing rising costs while maintaining high-quality educational programming.

Net Surplus or Deficit and Fund Balance
SRMCS ended FY26 with a strong General Fund balance, reflecting continued financial stability and responsible fiscal oversight.

Fund 1 – General Fund: The school reported a net surplus of $157,962, increasing its fund balance from $772,641 to $930,603. The ending General Fund balance represents approximately 37.9% of annual General Fund expenditures, providing a financial reserve to support ongoing operations and unexpected expenses.

Fund 2 – Food Service: The school reported an ending fund balance of $3,858.

Fund 4 – Community Service: The school reported a net deficit of $3,105 and an ending fund balance of $67,876.

Maintaining a healthy fund balance remains an important financial priority for SRMCS. The school will continue to monitor revenues, expenditures, and enrollment trends to support long-term financial sustainability. The board remains committed to maintaining adequate financial reserves while investing in staff, instructional programs, and student services.

TOTAL BALANCE of ALL FUNDS = $930,603

Comprehensive Achievement and Civic Readiness Annual Budget
SRMCS supports implementation of its Comprehensive Achievement and Civic Readiness (CACR) Plan through its annual operating budget. Funding supports instructional staffing, academic interventions, special education services, professional development, student assessments, and instructional materials.
These expenditures support the school's commitment to improving student achievement, meeting Minnesota academic standards, and providing individualized instruction within its Montessori educational model. Resources are allocated through the school's regular budgeting process, with continued monitoring of student needs and academic performance to guide financial decisions.

Strategic Planning for the Future

Swan River Montessori Charter School (SRMCS) remains committed to long-term sustainability, continuous academic improvement, and providing a high-quality Montessori education. Future planning focuses on maintaining our facilities, investing in technology, strengthening instructional programs, and ensuring responsible financial management.

Expansion Plans
While SRMCS continues to receive interest from families regarding expansion into higher grade levels, there are currently no plans to expand beyond sixth grade or increase our existing facilities. Our focus remains on maintaining small class sizes and providing a high-quality Montessori education within our current program.

Facility Changes and Long-Range Planning
SRMCS continues to prioritize the maintenance and improvement of its existing facilities. Recognizing that furniture, instructional materials, books, technology, and other equipment require replacement over time, the Board of Directors continues to work with the school's financial consultant to develop long-range plans for future expenditures. These efforts help ensure that our facilities and classrooms remain safe, functional, and supportive of student learning.

Technology Updates
Technology improvements are a priority for SRMCS as we work to provide students and staff with reliable, up-to-date educational resources. The school has upgraded its internet system to improve connectivity and support daily instructional and operational needs.
Moving forward, SRMCS plans to replace aging student computers and select staff computers. These upgrades will help ensure that students have access to reliable technology for learning and assessments while supporting staff productivity and school operations.

Educational Program Improvements
SRMCS will continue strengthening its academic programs while maintaining its Montessori philosophy. Areas of focus include implementing instructional practices aligned with the Science of Reading, strengthening reading interventions, and ensuring that Montessori mathematics instruction aligns with updated Minnesota academic standards.

Teachers will continue collaborating to review student achievement data, align curriculum, and identify opportunities to improve instructional practices and student outcomes.

Financial Planning and Strategic Investments

SRMCS remains committed to responsible financial planning while addressing increasing operational costs and future educational needs. Planned technology replacements, instructional materials, and facility maintenance will be considered within the school's annual budgeting and long-range financial planning processes.

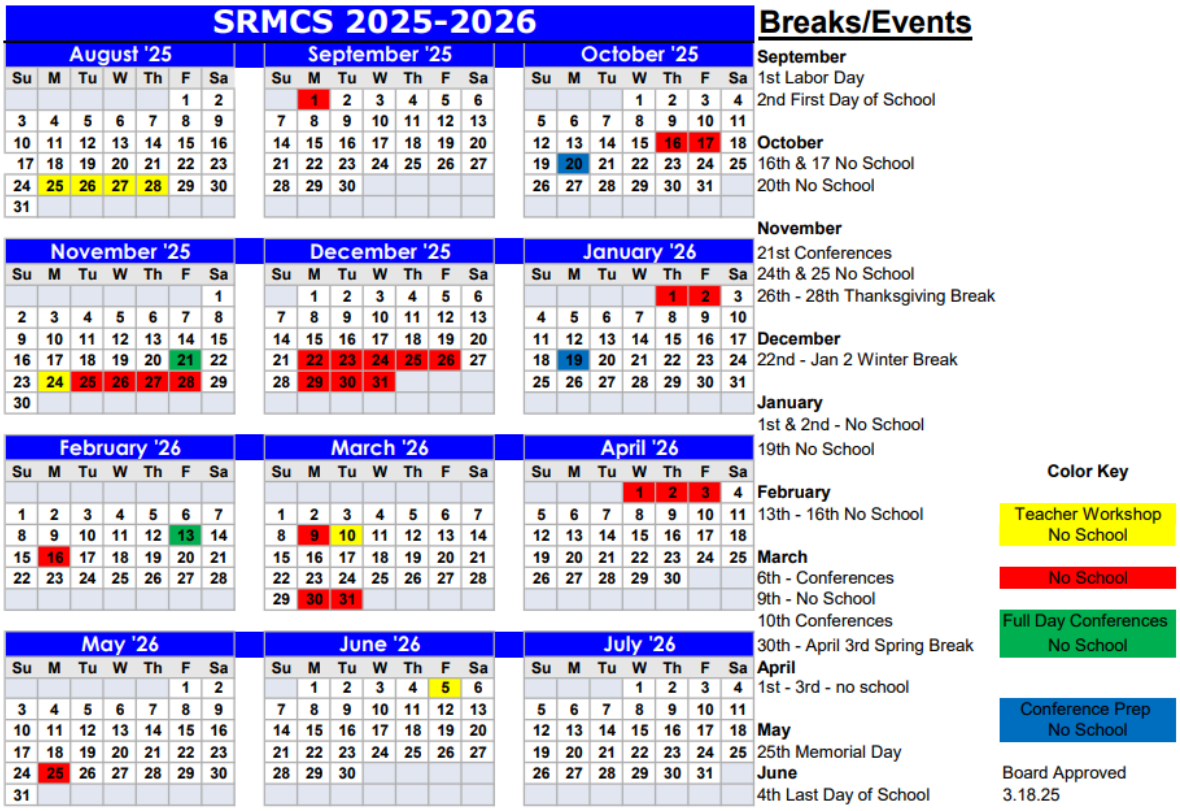
The school will continue monitoring state funding, legislative changes, and operational expenses to ensure resources are allocated effectively. Maintaining a healthy fund balance while making necessary investments in our educational program remains a priority.

Through thoughtful planning and strategic investments, SRMCS will continue providing a supportive, engaging, and academically strong Montessori learning environment for its students.

Attachments

SRMCS Board Approved Calendar for 2025-2026

Swan River Montessori Charter School District 4137



SRMCS Board Approved Calendar for 2026-2027

Swan River Montessori Charter School District 4137

