

The Community Roots School

Charter School Annual Report

2019-20 School Year

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This annual report provides a comprehensive picture of the recently completed academic year, 2019-20. The annual report will be used by the Silver Falls School District to review the school's performance and progress for the past academic year.

1. CRS History and Summary of 2019/20

The story began when parents in the Silverton community were introduced to the Montessori philosophy. The private elementary in a neighboring community closed and a small group of parents continued to dream big. They wanted their children to participate in a peaceful, child-centered educational system. Many parents in this small group embraced the Montessori philosophy but also struggled with the prospect of enrolling their children in private school for their elementary years. Other parents were very interested in the Montessori philosophy, but private school was not an option for their families.

Through discussions about a shared passion for the Montessori philosophy and a desire for a public school option, parents struck upon the charter school concept. After a few meetings over coffee, it was decided that the concept should be explored with other interested parents who shared the same passion. A meeting at The Home Place Restaurant was scheduled for December 2007, and it was there that the idea of The Community Roots School (CRS) was hatched. An application for a planning grant was submitted to the Oregon Department of Education in March 2008. In the spring of 2008, The Community Roots School was awarded a \$55,000 planning grant. With that approval came the potential for more than \$100,000 for each of the next two years for the implementation of the school.

This planning grant funded many activities over the next year including community meetings and outreach, consultation for the charter application to the school district, start-up materials for the school, and recruiting. Over 1,200 volunteer hours were needed to research, design and create a charter application. Support from other public charter Montessori schools, including Ridgeline and Lewis and Clark, was invaluable.

In November 2008, the founding members submitted their application for the charter to the SFSD Board. The founding members were as follows: Bart Banks, Jacquie Curtis, Jennifer de Jong, Jennifer Kimball, Erika Lanning, Jennifer McCord, Matt Miller, Sarah Miller, Frank Petrik, Mandy Petrik, Jennifer Traeger and Miranda Traeger.

During the school's eighth year of operation, our school moved into a new facility within the Silverton Friends Church. The move allowed the school to establish a sense of home for our community. We are offering a Garden Program and have vegetable gardens, native plant garden, chicken, and a compost bin at the main campus on Eureka. CRS offered Band, Art Instruction, afterschool Lego Robotics, and many other activities.

CRS had a middle school program consisting of 7th and 8th Grades. This unique Montessori model offers middle school/adolescent students the amazing opportunity to meet their developmental needs. The Erdkinder/adolescent program partnered with GeerCrest Farm and students milked goats, harvested and prepared/canned food, and participated in various other farm economic activities.

In 2019/20 CRS had 128 students in one Kindergarten classroom, two lower elementary classrooms (1st – 3rd), two upper elementary classrooms (4th – 6th), and 1 Adolescent classroom (7th & 8th). CRS may explore the options of growth to include a Montessori Children’s house (inclusion of 3 and 4 year old students).

2. Mission Statement

The CRS Board of Directors is purpose driven and guided by the mission statement created by the original group of founding members. The mission statement, which is read at the beginning of each board meeting, is as follows:

“Rooted in our local community, we learn in an authentic Montessori environment, growing as conscientious and joyful learners, inspired to lead in the world community”.

3. Innovative Learning Environment, the Montessori Pedagogy Overview

Incorporating the Montessori philosophy into the public school system is challenging and must be handled delicately. Montessorians believe that the child develops and works at his/her own speed and chooses works according to his inner psyche.¹ The inner tug-of-war public Montessori teachers face daily is that of “teach to the test” vs. “follow the child”. Recognizing this tension, CRS has adopted three goals: 1) make sure that Montessori remains as authentic as we can make it within a charter setting, 2) ensure that teachers understand what is expected of students, and 3) ensure that every child receives help in attaining mastery of these skills.

During the 2019-20 school year, we maintained the classroom configurations that align with the recommendations laid out by Maria Montessori. The lower elementary classrooms contain grades 1-3 and upper elementary classrooms have grades 4-6. Students are grouped into these grade levels based on very sensitive developmental periods as well as the need for a three-year cycle. CRS is now offering a stand-alone Kindergarten, which is out of alignment with the multi-year Montessori methodology. CRS will look into the option of providing an authentic Montessori environment by including 3 and 4 year old options. The primary challenge with adding a preschool option is the lack of public funding. The Board is considering all possible options before committing to this option.

Each child’s progress through the Montessori curriculum is based on a proficiency model. Students will be able to move through the materials based on their ability to “master” their work. The teachers take very detailed records on each child’s progress through the materials. Lessons are taught in small groups based on their individual progress.

The classroom environment is an essential component to the success of the Montessori program. Maria Montessori spent years observing children and creating materials that meet the needs of the child’s various developmental needs. The materials are created as much as possible out of natural materials to help to create a respect and care for the items. The materials are placed on shelves that students can always be easily accessed as to nurture the child’s independence.

4. Board of Directors

The Community Roots School Board, for the 2019-20 school year, was comprised of five members. Each board member is elected for two years. Officers of the board are elected at the annual meeting (usually in May or June).

19-20 CRS Board Members:

Dan Kaplan – Chairperson

Dan Kaplan is the Operations Manager for an Oregon manufacturing company. He is pragmatic, good at tracking many moving parts of a project and a consensus builder. With an educational background in child and family development Dan is heavily invested in the Silverton Montessori community and is passionately interested in the continued viability of Silverton's only Charter Montessori option. Dan and his wife Megan have three children.

Jason Wagoner – Treasurer

Jason joined the CRS board in 2014, taking on the role of treasurer two years later. Jason is a graduate of Southern Oregon University with degrees in both Biology and History. In 2006, along with his wife, Melissa, Jason moved to Silverton to work for the Oregon Parks and Recreation Department. Over the past 13 years, the couple has fallen in love with the Silverton community and, as their family has grown, have enjoyed taking an interest in their children's education. Having served as a board member for the past five years, Jason has had the opportunity to watch the school grow and has found this both challenging and rewarding. The mission of Community Roots School and opportunity to provide its students with a quality education has been a rewarding experience.

Jennifer (Jen) De Jong

Jennifer is a founding member of Community Roots School and is the current Board President and Chair. She holds a B.S in Psychology and works as a Project Director with the Department of Human Services, Modernization Initiative. She was introduced to Montessori education in 2006 and was instantly attracted to the concepts of child-centered education, fostering a child's joy of learning and the prospect of inspiring social change through education. She has been a part of many accomplishments and lessons that CRS has encountered and is committed to the mission and the determination to provide this as an option to our wonderful community. Jennifer and her husband, Jeff Reilly, have three girls. Each of her girls had attended Community Roots. She currently has one at Silverton High School and another at Silverton Middle School.

Astrid Potter - Board Member

Astrid wants to be a part of the CRS board so that she can be a resource to the guides (teachers) and administration to support and empower them to address the needs of the individual child. Astrid values the Montessori prepared classroom environment as it empowers each child to learn and grow at their own pace. She hopes to lead by example, demonstrating the importance of community involvement. Astrid has been an active volunteer on the CRS Facilities committee

and instrumental the significant coordination necessary for the CRS move. Astrid brings a professional background in project management, engineering and contract administration. Her professional experiences have provided her with skills in staff supervision, budgeting, negotiations, organization and most importantly, critical thinking.

Rhonda Bostic – Board Member

Board Meetings

The Community Roots School Board meets on the first Tuesday of each month at 6:30 p.m. at the CRS campus. Special meetings are scheduled as necessary. Each meeting is conducted using Robert’s Rules of Order and includes noting attendance, reading of the Mission Statement, approving the consent agenda, asking for audience comments, a financial report, voting on action items and adjourning.

Board Training and Development

Continuing the tradition established in 2012, the board had recognized the importance of continuous board training and designates the first half hour of each board meeting to board training, including journal reviews, team building and further education. Topics covered in board trainings included finance, board orientation, and various other trainings.

5. School Configuration and Enrollment

128 children were enrolled in six classrooms. CRS had a stand-alone Kindergarten. There are 2 lower elementary classrooms with a combination of 1st, 2nd and 3rd grades. The upper elementary classrooms are a combination of 4th, 5th, and 6th grades. The adolescent program is its own standalone classroom of 7th and 8th grade students. Budgetary modifications were made to ensure limited effect on the learning environment for the students. Our final ADM was 125.73.

Enrollment for 2019-20

Enrollment forms for 2018-19 met our expectations with interest from both in-district and out-of district, resulting in a lottery. The lottery process allowed students to be placed in slots on the waitlist at random. The lottery process was aligned with distinct guidelines. After the lottery, intent to enroll forms were received from 26 students for the 2019/20 academic year. Outreach was conducted by word of mouth and street banners in town. The school continues to attract families from out of state and other communities who choose to relocate to Silverton.

General School Day Schedule 2018-19

- | | |
|--------------------|---|
| 7:55 | Option to catch the bus at Robert Frost |
| 8:15 – 8:30 | Students arrive |
| 8:30 | Three hour work cycle, meeting, lunch preparation |

11:30-12:30	Lunch and recess
12:45-3:15	Large group lessons: PE, Music, botany, zoology, history, art, language, and care for the classroom environment
3:15	School day ends – children being picked up by car leave at this time
3:30	Bus children leave CRS, arrive at Mark Twain at 3:35

Community Roots follows the SFSD calendar, including early release, grading, conferences, and holidays.

6. Policy Development

As of 2015, CRS had adopted charter school policies from The Oregon School Board Association. The policies are reviewed based on guidance from OSBA and revised and adopted by the CRS board. The school subscribes to the OSBA policy updates and reviews policies each month to remain current and relevant. The board policies can be located through the OSBA policy site. The Community Roots School’s financial committee has its own Fiscal Policies and Procedure Manual and our charter adheres to the SFSD policies and procedures surrounding billing, payroll, personal files, and other SFSD provided services.

2015 – The board adopted a complete package of OSBA charter school policies. These policies are available on the OSBA policy site. CRS board reviewed and approved a 5-year budget and released our 16-17 budget to SFSD. The strategic plan was reviewed and adopted as a working document.

2016 – The CRS board reviewed and updated OSBA policies.

2017 – CRS purchased, reviewed and implemented the OSBA charter school student and staff handbooks.

2018 & 2019 – Handbooks and policies were updated to better align with the desired school culture.

CRS policies are found online: <http://policy.osba.org/commrt/index.asp>

7. Staffing and Professional Opportunities for Teachers

For the 2019-19 school year, staff included seven full time teachers, five assistants, a full time administrator, part-time instructional assistant supporting reading intervention work, a part time NCMPS trained Montessori coach, and a full time office manager. Heather Kofstad led our Kindergarten classroom and she comes from a Montessori background. Hilary Conroy is one of the lower elementary teachers working with students in grades 1–3. Hilary comes to CRS with

public school training as well as lower elementary Montessori training. Michelle Bryntesen is the school's other lower elementary teacher and has previously worked at CRS as a classroom assistant for a number of years. She is finishing up her Montessori teacher's training. Christopher Shutt joined CRS as an upper elementary teacher and completed his Montessori training through MINW in Portland, OR. Ginnie Vigansky joined CRS as an Upper Elementary teacher, having previously taught at a Montessori school in Corvallis. Susan Andree is another upper elementary teacher, and holds a public school license. She is currently working to design an Oregon-based pathway for Montessori certified teachers to obtain an Oregon Teaching License. Bridgett Steveson was hired to guide our middle school program. She has Montessori certification and an Oregon charter school registry with TSPC. CRS petitioned SFSD and got approval for a modified timeline to get 50% of our teaching staff state certified. Susan Andree is enrolled in a public school credentialed teaching program.

Each elementary classroom had an assistant for 7.5 hours a day. Assistants were in charge of aiding children in problem solving, monitoring behavior, and working with children while the teacher was providing lessons to small groups or individual students. Miranda Pickner returned as the administrator. Jennifer Wiese continued as our Office Manager. CRS was able to offer intervention support based on Dyslexic screening tools. The intervention work was supported by staff members Hilary Conroy, Mindy McCraw, Jo Tucker, and Debbie Stratton. Christen Kelly joined the team as an NCMPS trained Montessori Coach, supporting teachers in deepening their practice as Montessori educators and assisting with self-reflective inventory tools.

8. Student Opportunities, Learning, Achievements and Performance

The math, language, science and history curricula at CRS offer hands-on materials for the child. Follow-up work assignments, using materials from teacher-guided lessons, enable the child to work at his/her own pace. Materials allow students to work independently and at the advanced levels of ability due to the control of error built within the material.

The Montessori classroom provides choices of learning opportunities for students. Students are given lessons on a daily basis and are assigned work to complete. Each work is added to the child's plan and the teacher monitors how and when the child completes this work. It is a choice for the child within their workday, but is a work that will need to be completed within the week. Student progress is carefully monitored throughout the year.

The Montessori student is responsible for working independently, but teachers, parents and students all benefit from work plans and accurate reporting. Work plans are sent home to parents at the teacher's discretion so they are aware of their child's progress. The board and staff focused on measuring academic achievements throughout the year.

The administrator and teachers worked through developing processes to accurately track student performance and achievement appropriately for *public* Montessori classrooms. CRS uses an online record keeping system, Transparent Classroom. Not only does it track the Montessori progression, but the Common Core Standards that are taught as well. Appendix 1 is an example

of a student report card that includes SFSD reporting standards. Students were assessed using the district's STAR assessment. It has been found to be helpful assessment tool.

Student report cards, assessment forms, progress reports, student information and work plans will inform parents and students of their progress. Further, in the Montessori environment, anecdotal records and informal assessments enable teacher assessment at any given moment to determine a student's level and ability within a material and/or concept. These innovative measurement tools are required and imperative to the success of charter schools. CRS reconfigured the progress reports to include the Common Core Standards.

Highlights of the children's year included family gatherings, performances, field trips, statewide assessments, and hosting many visitors. Everyone came together for the Annual Start of the Year Picnic at the end of summer. An October tradition is Historical Halloween, where students dress as historical figures and perform memorized speeches in front of the whole school community at an evening event for families. The year concluded in June with the annual Moving Up Ceremony, celebrating students as they move from one grade to the next, with a special focus on the "senior" students in each class who are recognized as school leaders. However, due to COVID-19 protocols, this was done as a "drive-thru" event coupled with a video highlighting the achievements of the students and celebrating the leaders with spotlight interviews.

CRS was able to hire specialty teachers. This was made possible by the amazing efforts of many parent volunteers on our fundraising committee. All students had the opportunity to engage in the garden with Alyssa Burge, our outdoor/garden specialist. As well, increased creative expression through art and music was supported by Lisa Gerlits and Tyler Miller.

In the spring, the children began SBAC testing. The testing scores indicated strength in our student's ability to take the Language portion of the SBAC. The CRS staff spends countless hours preparing students for the LA section of the SBAC with a focus on the new writing requirements. CRS also adopted a keyboarding program to prepare students for the SBAC. The SBAC for 2019-20 was cancelled due to COVID-19 school closures in the spring. CRS staff will be utilizing data from the STAR assessment to provide feedback to staff in areas of individual growth. For specific questions regarding the report card, please contact Miranda Pickner.

9. Oversight Visits and Additional School Performance Data

The Community Roots School Administrator, Miranda Pickner, presented the 2018-19- Annual Report to the Silver Falls School District Board in November of 2019 and updated the board on its progress. As part of its sponsor responsibilities, members of Silver Falls School District staff made monitoring and technical assistance visits throughout the school year. The sense of collaboration between the district and the school continues with a strong foundation to quickly address issues as they arise and to ensure appropriate oversight and accountability.

At the end of the 2019-20 school year, CRS transitioned to distance learning, focusing on care and connection, due to the COVID-19 pandemic. The longstanding Administrator, Miranda Pickner, moved on, and Christen Kelly was hired as the new Administrator at the end of June.

Through an Expansion Grant with the Oregon Department of Education, CRS has been able to contract with multiple agencies to provide support and professional development for the school. CRS has a Montessori consultant, Jonathan Wolff, that supports the authentic Montessori mission of the school by doing classroom observations and providing staff feedback, staff PD in the area of consistency of practice, and parent education nights supporting Montessori work at home. CRS also has contracted out with the National Center for Montessori in the Public Sector to assess the school utilizing the Essential Elements Rubric for Public Montessori Schools. This assessment comes with recommendations for school improvement and support from Seth Webb, NCMPS consultant.

This grant has also afforded us the opportunity to partner with SFSD to do equity training for all the school boards within SFSD boundaries and SFSD leadership. We partnered with Christine Moses of Buffalo Cloud Consulting to focus on Equity and Inclusion within our decision making process, and school environment.

10. Financials

Budgets

In April 2019, Community Roots School submitted its SSF operational budget, for the 2019-20 school year, to the Silver Falls School District. CRS also has a Supplemental School Operations Budget that is also referred to as our Fundraising budget in a separate checking account. That budget was proposed to the CRS board and approved in the Winter of 2019. Approved budgets are attached in Appendices 3 and 4.

Fiscal Management

In 2011, the Community Roots School board created a Finance Committee made up of one community member, a board member, and the administrator. The Finance Committee is charged with previewing budgets and monetary decisions in an effort to more efficiently manage finances at the board level. All pertinent decisions must be voted on by the board, but the Committee foresees questions and issues. The Community Roots School board has an adopted Fiscal Policy and Procedures, and this document is reviewed and approved annually. This document outlines appropriate and extremely detailed practices. The board designated Treasurer - Jason Wagoner, Administrator - Miranda Pickner, fundraising chair - Irene Schmuker, Board Member – Rhonda Bostic, and Parent Volunteer – Troy Barney were charged with the oversight of the school's finances for the 19-20 school year.

Financial oversight of our fundraising account is described in the board approved Fiscal Policies & Procedures Manual. A part time bookkeeper manages the "fundraising account" which is held at Citizens Bank in Silverton.

For the 2019-2020 school year, The Community Roots School was one of the district schools that received a generous community donation in the amount of \$12,000. It was such a great relief to the staff. Staff was able to provide much needed supplemental materials for their classrooms. Silver Falls School District acted as the fiscal agent for the State School Fund funds. Community Roots School maintains a checking account, the "fundraising account", to maintain its fundraised

funds for the year. The State School Fund was accounted for through the district's accounting software, iVisions, and fundraised activities are accounted for through QuickBooks. Reports were created monthly for review by the finance committee and then for board approval for all streams of funds. Attached in Appendix 4 are the year-end financials for the school.

Grant Writing

CRS was approved for a substantial Expansion Grant through the Oregon Department of Education. CRS was awarded for a 2 year period, \$449,510. The CRS board has provided oversight of the use of these funds.

Goal #1: Complete K-8 Alignment and comprehensive Adolescent curriculum & materials

Goal #2: Fully Equipped Authentic Montessori Adolescent Classroom

Goal #3: Land based Economic Production and Farm Occupation equipment

Goal #4: Improving Outcomes for Historically Underserved Students

Goal #5: Highly Trained Montessori Staff

Fundraising

The CRS Fundraising Committee consists of a group of CRS parents and Astrid Potter as the board representative. Fundraising events were diverse and in 2019-20 an estimated \$55,804 was raised by the fundraising committee. In 2019-20 fundraising dollars were expected to contribute to areas of need such as "specials" like music, art, and garden instruction. The paddle up from the annual auction in the fall of 2020 funded musical instruments and curriculum expenses.

Fundraising efforts include wreath sales, purchasing ability through Amazon.com, Box Tops for Education, annual auction, and a garage sale.

Audit

CRS participated in a fiscal audit as required. The third-party auditor will produce a Financial Statement. Pauly, Rogers & Co. is in the process of finalizing the audit for the SFSD. Information is attached in Appendix 5.

11. Charter Contract Compliance Requirements

The following goals were outlined in our initial Charter Contract.

High Academic Achievement

Community Roots School follows the Oregon and federal curricular requirements.

Social Growth and Emotional Development

Montessori students realize the non-academic outcomes of the Montessori philosophy, such as respect for self, others, and the environment, self-motivation, and self-reliance. This builds on their ability to work independently in an environment that requires students to solve problems and rely on each other to work through materials. Those who observe the classrooms will see these outcomes occurring on a daily basis.

Strong Links with the Community

The first line of Community Roots School's mission statement is, "Rooted in our local community." The many fundraising activities brought the community and school together. CRS

walks as a school in the Pet Parade. The annual auction was held at the Mt Angel Festhalle. Through this event, businesses engaged in donating services and goods and time. Community members attended the auction.

For several years, CRS has hosted an artist in residence, which allows a link between the vivid art community of Silverton and the Community Roots School.

The students hosted a food drive at the school, and held a fundraiser, Pennies for Patients, to help support children through the Leukemia & Lymphoma Society. The in-town location has allowed our classrooms to move outside. Both classes took multiple walking trips to the park, the library, the Silverton Museum, and SACA. Our upper elementary students continue our “going out” program, allowing our 4th – 6th graders learning opportunities outside the classroom.

The middle school program is formed a partnership with GeerCrest Farm. Students spend at least 2 weeks a month at the farm engaging in project-based learning. The partnership with GeerCrest Farm is ripe with possibility.

Successful Montessori Program

Creating an authentic Montessori environment is part of the CRS Mission. Through continuous education of the staff, parents and children, we strive to achieve authenticity. CRS has hired Montessori certified teachers and implemented the Montessori curriculum. Staff pursue ongoing professional learning to strengthen their Montessori implementation in the school. With the ODE Expansion Grant in the 18-19 school year, there was a renewed plan for a needs assessment and evaluation of our current mission of an Authentic Montessori model. Focus groups were held with parents, staff, and board members and an in depth look at our Montessori classrooms, policies, and practices were completed by the National Center for Montessori in the Public Sector (NCMPS). For the 19-20 school year, staff and board will took the information from the report and began creating a strategic plan of support and accountability.

Active Parent Participation

Community Roots Parents show commitment to the school and their children’s education and contribute on many capacities. Parent participation was encouraged through community education events, meetings with teachers, community building events and fundraising events. Highlights for community education events included in-classroom extended day parent education afternoons where students and staff introduced Montessori concepts and curriculum to family members. CRS hosted a parent education night with Montessori consultant Jonathan Wolff. Parents were also encouraged to observe the classrooms as well as attend the bi-annual parent-teacher conferences. Fundraising and Community Building events often coincide and range a from garage sale to our annual auction. However, due to the COVID-19 closure in the spring, the annual garage sale was postponed in 2020.

12. Goals outlined in ORS 338.015

The Community Roots School is consistent with all of the goals outlined in ORS 338.015. To avoid redundancy, this report has been adapted in order to describe in detail how these goals are being achieved. Below one will see how these goals have been adapted in this report.

A: Increase student learning and achievement

Section 8. Student Opportunities, Learning, Achievements and Performance

B: Increase choices of learning opportunities for students.

Sections 8. Student Opportunities, Learning, Achievements and Performance

Section 11. Charter Contract Compliance Requirements: *High Academic Achievement*

C: Better meet individual student academic needs and interests.

Section 11. Charter Contract Compliance Requirements: *High Academic Achievement*

D: Build stronger working relationships among educators, parents and other community members

Section 11. Charter Contract Compliance Requirements: *Stronger Links with the Community and Active Parent Participation*

E: Encourage the use of different and innovative learning methods

Section 3. Innovative Learning Environment, The Montessori Pedagogy Overview

F: Provide opportunities in small learning environments for flexibility and innovation, which may be applied, if proven effective, to other public schools

Section 3. Innovative Learning Environment, The Montessori Pedagogy Overview

Sections 8. Student Opportunities, Learning, Achievements and Performance

G: Create new professional opportunities for teachers

Section 7. Staffing and Professional Opportunities for Teachers

H: Establish additional forms of accountability for schools

Section 8. Student Opportunities, Learning, Achievements and Performance

I: Create innovative measurement tools.

Section 8. Student Opportunities, Learning, Achievements and Performance

13. Accomplishment of Goals for 2019-20

The Community Roots School Board engaged in an annual assessment of our Montessori principles. The CRS board utilized a tool by the National Center for Montessori in the Public Sector. Each year staff, board and administration rate the school and create goals for the next school year.

The 19-20 included Seth Webb, a Montessori consultant from NCMPS, conducting an audit of our school utilizing the DERS observation tools, EER (Essential Elements Rubric) a Montessori assessment Rubric, and input from the CRS staff and board. The audit identified some concrete work that CRS is working to adopt. CRS administration has established a leadership team for the first time in 2018 and that group of CRS guides meets monthly to work on the goal of the EER. This work will continually be supported by Seth Webb and The National Center for Montessori in the Public Sector. CRS continued these procedures and practices for the 19-20 school year:

- 1) Child Study – in depth study by a team
- 2) Coaches – every staff member at CRS has a mentor/coach
- 3) New Progress Reports – Focus on Social/Emotional Fluency, Executive Functions, and Critical Thinking Skills
- 4) Normalization/Adjustment Checklist – ability of a child to access Montessori curriculum
- 5) Montessori Assistant Training for every assistant
- 6) All guides will be Montessori Trained

14. Montessori Resources

1. **Schaitel, Nancy.** "Charter schools and Montessori: A marriage of opposites" *Public School Montessorian*, Fall 2012, V25,1.
2. **Lillard, Angeline Stoll.** Montessori: The Science Behind the Genius. New York: Oxford University Press. 2005.
2. **Lillard, Paula P.** Montessori Today. New York: Random House. 1996.
3. **The Montessori Elementary Program** North American Montessori Teachers Association. http://www.montessori-namta.org/Index.php?option=com_content&view=article&id=87. Retrieved 10/01/11.
4. **Montessori, Maria** (1969). "The Four Planes of Development". *AMI Communications* (2/3): 4–10.
5. **Grazzini, Camillo** (Jan/Feb 1988). "The Four Planes of Development: A Constructive Rhythm of Life". *Montessori Today* 1 (1): 7–8.
6. **Montessori, Maria** (1994). *From Childhood to Adolescence*. Oxford, England

Appendix 1

Sample Student Report Card

The Community Roots School 2019-2020

Elementary Progress Report

Student's Name: _____ Days Present: _____

Teacher's Name: _____ Days Absent: _____

Grade Level: _____

Social, Emotional, & Executive Development

KEY: F = Frequently O = Occasionally R = Rarely

	Nov.	March	June	Nov.	March	June
Social Fluency & Emotional Flexibility						
Shows Gratitude						
Accepts responsibility for actions						
Speaks and listens with understanding and respect						
Interacts cooperatively with peers						
Shows sensitivity to the needs and feelings of others						
Executive Functions	Nov.	March	June	Nov.	March	June
Demonstrates initiative						
Makes appropriate work choices						
Sustains appropriate focus during work						
Persists and follows work through to completion						
Transitions between activities smoothly						
Critical & Creative Thinking	Nov.	March	June	Nov.	March	June
Tolerates uncertainty						
Uses reflection/feedback as a tool for growth						
Investigates/Explores interests with passion						
Provides detailed observations & descriptions						

Comments:

Appendix 2

ODE Report Card

Due to COVID-19, not reporting.

Appendix 3

2019 - 2020 Approved Budget

760 - State School Support Fund

REVENUE:			
760-3101-00	135 enrolled	State School Fund—General Support	\$925,323
760-5400-00		Reserve Rollover from 17-18	\$82,917
760-????		Lunch Program	\$10,000
760-1760-00		Supplemental from Fundraised account	\$25,000
TOTAL REVENUE			\$1,043,240

EXPENSES:			
1000			
	1111- K-5 Instruction		
	760-1111-111-142-00-00	Certified Salaries	245,000
	760-1111-112-142-00-00	Classified Salaries	130,000
	760-1111-121-142-00-00	Certified Substitutes	5,000
	760-1111-122-142-00-00	Classified Substitutes	2,500
	760-1111-211-142-00-00	PERS - Employer Contribution	55,828
	760-1111-213-142-00-00	PERS - Employer Contribution	30,280
	760-1111-220-142-00-00	Social Security Admin - FICA/Medicare	28,955
	760-1111-231-142-00-00	Workers' Compensation	\$2,081
	760-1111-240-142-00-00	Contractual Employee Benefits	69,000
	760-1111-410-142-00-00	Consumable Supplies/Materials	\$6,000
	1111 - Totals		\$574,644
2000			
	1121- 6-8 Instruction		
	760-1121-111-142-00-00	Certified Salaries	95,000
	760-1121-211-142-00-00	PERS - Employer Contribution	14,013
	760-1121-213-142-00-00	PERS - Employer Contribution	7,600
	760-1121-220-142-00-00	Social Security Admin - FICA/Medicare	7,269
	760-1121-231-142-00-00	Workers' Compensation	\$523
	760-1121-240-142-00-00	Contractual Employee Benefits	16,000
	1121 - Totals		\$140,405
	2240 - Instructional Staff Development		
	760-2240-000-142-00-00	Instructional Professional/Tech (Staff/Curriculum Develop)	\$10,000
	2240 Totals		\$10,000
	2310 - Board of Education Services		
	760-2310-380-142-00-00	Non-Instructional Professional & Technical Svs	\$2,500
	760-2310-381-142-00-00	Audit Services	\$6,000
	760-2310-650-142-00-00	Insurance and Judgements	\$5,500
	2310 - Totals		\$14,000

2490 - Other Support SVCS - School Adm			
	760-2490-112-142-00-00	Classified Salaries	20,218
	760-2490-113-142-00-00	Administrators Salaries	70,791
	760-2490-121-142-00-00	Certified Substitutes	700
	760-2490-240-142-00-00	Contractual Employee Benefits	\$12,500
	760-2490-211-142-00-00	PERS - Employer Contribution	\$13,765
	760-2490-213-142-00-00	PERS - Employer Contribution	\$7,466
	760-2490-220-142-00-00	Social Security Admin - FICA/Medicare	\$7,139
	760-2490-231-142-00-00	Workers' Compensation	\$513
	760-2490-410-142-00-00	Consumable Supplies & Materials	\$4,356
	760-2490-640-142-00-00	Dues & Fees	\$5,556
	2490 - Totals		\$143,004
2520 - Fiscal Services			
	760-2550-231-142-00-00	Workers' Compensation - whole school	\$0
	760-2550-380-142-00-00	Non-Instructional Professional & Technical Svs	\$2,000
	2520 - Totals		\$2,000
2540 - Operations & Maintenance			
	760-2540-320-142-00-00	Property Services (Rent)	\$40,000
	760-2540-380-142-00-00	Non-Instructional Professional & Technical Svs	\$7,500
	2540 - Totals		\$47,500
2550 - Student Transportation Services			
	760-2550-330-142-00-00	Student Transportation Services	\$1,000
	2550 - Totals		\$1,000
3100 - Food			
	760-2490-112-142-00-00	Classified Salaries	8,500
	760-2490-211-142-00-00	PERS - Employer Contribution	\$450
	760-2490-213-142-00-00	PERS - Employer Contribution	\$300
	760-2490-220-142-00-00	Social Security Admin - FICA/Medicare	\$300
	760-2490-231-142-00-00	Workers' Compensation	\$20
	760-3100-640-142-00-00	Dues & Fees	\$430
	3100 - Totals		\$10,000
6000			
6000 - Contingencies			
	760-6000-810-142-00-00	Planned contingency	\$12,007
	Ending fund balance set aside for reserve fund		\$88,680
	6000 - Totals		\$100,687
EXPENSE TOTALS			\$1,043,240
Revenue less Expenses			\$0

Appendix 4

End of the Year Budget Reports

(As of 10/30/20 - the 2019-20 Budget has not been finalized due to some outstanding reconciliations with the SFSD Business office. CRS will provide copies to SFSD when those have been completed.)

19-20 CRS - SSF Budget
DRAFT 10/29/2020

Account	Description	Budget	YTD Transactions	Balance	Encumbrance	Budget Balance
Revenue						
760.0000.1600.142.000.000	Food Service	11980.00	0.00	11980.00	0.00	11980.00
760.0000.1760.142.000.000	Dyslexia Grant - 1902.35 (posted July 1, 2019)	1902.35	0.00	1902.35	0.00	1902.35
760.0000.1990.142.000.000	Fund Raising	41705.00	41705.00	0.00	0.00	0.00
	Miscellaneous - School Related	5000.00	0.00	5000.00	0.00	5000.00
760.0000.3101.142.000.000	State School Fund—General Support (131.82) \$6719	888817.43	888817.43	0.00	0.00	0.00
760.0000.5400.142.000.000	BEGINNING FUND BALANCE	80005.00	80005.00	0.00	0.00	0.00
	Total Revenue	<u>1029409.78</u>	<u>1010527.43</u>	<u>18882.35</u>	<u>0.00</u>	<u>18882.35</u>
Expenditures						
760.1111.0111.142.000.000	Licensed Salaries	213000.00	207519.31	5480.69	0.00	5480.69
760.1111.0112.142.000.000	Classified Salaries	123310.00	113302.91	10007.09	7113.43	2893.66
760.1111.0117.142.000.000	Unused Leave	3000.00		3000.00	3000.00	0.00
760.1111.0211.142.000.000	Employer Contribution, Tier I and Tier II	49069.00	45093.50	3975.50	3975.03	0.47
760.1111.0213.142.000.000	PERS UAL Contribution	22740.00	20815.38	1924.62	1920.78	3.84
760.1111.0220.142.000.000	Social Security Administration	25148.00	23188.31	1959.69	1959.56	0.13
760.1111.0231.142.000.000	Workers' Compensation	175.00	159.71	15.29	8.31	6.98
760.1111.0240.142.000.000	Contractual Employee Benefits	51286.00	47001.46	4284.54	4284.42	0.12
760.1111.0310.142.000.000	PRIMARY INSTRUCTION/SERVICES	0.00		0.00	0.00	0.00
760.1111.0311.142.000.000	Instruction Services - Substitutes	10065.00	10062.10	2.90	0.00	2.90
760.1111.0312.142.000.000	Instructional Programs Improvement Services - Subs	1938.00	1937.00	1.00	0.00	1.00
760.1111.0410.142.000.000	Consumable Supplies and Materials	14300.00	14135.94	164.06	185.87	-21.81
760.1111.0640.142.000.000	Dues and Fees (Robotics and Art)	3125.00	2592.43	532.57	0.00	532.57
760.1121.0111.142.050.000	Licensed Salaries	126844.00	116356.88	10487.12	7537.47	2949.65
760.1121.0121.142.050.000	Classified Salaries	14024.00	12854.47	1169.53	837.14	332.39
760.1121.0211.142.000.000	Employer Contribution, Tier I and Tier II	21050.00	19173.00	1877.00	1870.89	6.11
760.1121.0213.142.000.000	PERS UAL Contribution	10300.00	9395.62	904.38	903.30	1.08
760.1121.0220.142.050.000	Social Security Administration	10692.00	9805.01	886.99	792.32	94.67
760.1121.0231.142.050.000	Workers' Compensation	56.00	53.32	2.68	2.88	-0.20

19-20 CRS - SSF Budget
DRAFT 10/29/2020

Account	Description	Budget	YTD Transactions	Balance	Encumbrance	Budget Balance
760.1121.0240.142.050.000	Contractual Employee Benefits	19027.00	17438.41	1588.59	1588.57	0.02
760.1121.0410.142.250.000	Consumables - adjusted to grant	-814.86	-814.86	0.00		0.00
760.1122.0124.142.250.000	Temporary Classified - Lego Robotics	954.00	953.16	0.84	0.00	0.84
760.1122.0124.220.250.000	Social Security Administration	73.00	72.92	0.08	0.00	0.08
760.1122.0124.231.250.000	WORKERS COMP	1.00	0.47	0.53	0.00	0.53
760.2210.0131.142.000.000	Extra Duty Licensed	2.92	2.92	0.00		0.00
760.2210.0211.142.000.000	PERS	0.46	0.46	0.00		0.00
760.2210.0213.142.000.000	PERS UAL	0.23	0.23	0.00		0.00
760.2210.0220.142.000.000	Social Security	0.22	0.22	0.00		0.00
760.2210.0410.142.000.000	Consumable Supplies and Materials	27.00	26.95	0.05	0.00	0.05
760.2240.0132.142.000.000	Extra Duty - Classified	130.00	129.14	0.86	0.00	0.86
760.2240.0211.142.280.000	DISTRICT PERS	21.00	20.35	0.65	0.00	0.65
760.2240.0213.142.280.000	PERS UAL	10.50	10.33	0.17	0.00	0.17
760.2240.0220.142.280.000	SOCIAL SECURITY	10.00	9.69	0.31	0.00	0.31
760.2240.0231.142.000.000	WORKERS COMP	1.00	0.14	0.86	0.00	0.86
760.2310.0350.142.000.000	Communication	396.00	395.64	0.36	0.00	0.36
760.2310.0381.142.000.000	Audit Services	250.00	250.00	0.00	0.00	0.00
760.2310.0382.142.000.000	Legal Services	238.00	237.50	0.50	0.00	0.50
760.2310.0640.142.000.000	Dues and Fees - Workers Comp - Audit	10430.00	10429.90	0.10	0.00	0.10
760.2310.0650.142.000.000	Insurance and Judgments	5205.00	5204.00	1.00	0.00	1.00
760.2310.0670.142.000.000	Taxes and Licenses - tax prep	1460.00	1457.00	3.00	0.00	3.00
760.2490.0112.142.000.000	Classified Salaries	24836.00	22588.83	2247.17	635.26	1611.91
760.2490.0113.142.000.000	Administrators	73906.00	67748.42	6157.58	4535.22	1622.36
760.2490.0211.142.000.000	Employer Contribution, Tier I and Tier II	15559.00	14233.93	1325.07	1324.50	0.57
760.2490.0213.142.000.000	PERS UAL Contribution	7800.00	7141.33	658.67	651.32	7.35
760.2490.0220.142.000.000	Social Security Administration	7480.00	6841.36	638.64	635.27	3.37
760.2490.0231.142.000.000	Workers' Compensation	36.00	32.61	3.39	2.64	0.75
760.2490.0240.142.000.000	Contractual Employee Benefits	17950.00	15653.43	2296.57	2290.31	6.26
760.2490.0312.142.000.000	Instructional Programs Improvement Services	1003.00	1002.94	0.06	0.00	0.06

19-20 CRS - SSF Budget
DRAFT 10/29/2020

Account	Description	Budget	YTD Transactions	Balance	Encumbrance	Budget Balance
760.2490.0350.142.000.000	Communication	200.00	0.00	200.00	200.00	0.00
760.2490.0410.142.000.000	Consumable Supplies and Materials	1600.00	1194.46	405.54	377.94	27.60
760.2490.0640.142.000.000	Dues & Fees / OSBA policy charge /Bookkeeper/	6800.00	6556.26	243.74	284.22	-40.48
760.2520.0380.142.000.000	Non-instructional Professional and Technical	225.00	225.00	0.00	0.00	0.00
760.2540.0320.142.000.000	Property Services	0.00		0.00	0.00	0.00
760.2540.0324.142.000.000	Rentals	45000.00	42788.74	2211.26	3250.00	-1038.74
760.2550.0330.142.000.000	Student Transportation Services	840.00	839.25	0.75	0.00	0.75
760.3100.0112.142.000.000	Classified Salaries	10200.00	9321.54	878.46	865.64	12.82
760.3100.0132.142.000.000	Extra Duty - Classified	57.29	57.29	0.00	0.00	0.00
760.3100.0211.142.000.000	Employer Contribution, Tier I and Tier II	820.00	683.12	136.88	136.42	0.46
760.3100.0213.142.000.000	PERS UAL Contribution	405.00	335.94	69.06	67.09	1.97
760.3100.0220.142.000.000	Social Security Administration	785.00	717.47	67.53	66.22	1.31
760.3100.0231.142.000.000	Workers' Compensation	10.00	8.69	1.31	0.47	0.84
760.3100.0389.142.000.000	Non-instructional Professional and Technical	193.00	192.69	0.31	0.00	0.31
760.3100.0450.142.000.000	Food	0.00	0.00	0.00	0.00	0.00
760.3100.0640.142.000.000	Dues and Fees	368.00	368.00	0.00	0.00	0.00
760.6110.0810.142.000.000	Planned Reserve	0.00	0.00	0.00	0.00	0.00
760.7000.0820.142.000.000	Reserved for Next Year	83000.00	83000.00	0.00	0.00	0.00
		\$1,036,617.76	\$970,802.22	\$65,815.54	\$51,302.49	\$14,513.05

Budget

	18-19 actual	19-20 Budgeted
Revenue	\$1,029,409.78	\$1,010,527.43
Expenditures	\$1,036,617.76	\$970,802.22
Balance	(\$7,207.98)	\$39,725.21

Furlough 19-20 about \$13000

Reserve Designations

	18-19 actual	19-20 Budgeted
Assigned	\$80,005	\$83,000
Assigned	\$20,939	\$31,000
Restricted	\$4,313	\$4,000
Restricted	\$29,692	\$29,692
Total Reserves	\$134,949	\$152,005

Appendix 5

2019 -2020 Audit Financial Report

(As of 10/30/20 - Audit Reports have not been received. CRS will provide copies to SFSD when those have been completed.)