



The Community Roots School Board Meeting

Tuesday, Oct. 3, 2023

6:30 p.m. 229 Eureka

Ave. Silverton, OR

Agenda

1. Call meeting to order – Sarah
2. Reading of Community Roots School Mission Statement
– Rebecca **(6:30)**
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. Consent Agenda **(6:35)**
 - Approve Sept 12, 2023 Meeting Minutes
4. Audience with Visitors (Audience members may make comments to the board on any topic)**(6:40)**
5. Administrator Report – Christen Kelly **(6:50-7:00)**
6. Committee reports (Fundraising, Finance, Facilities) **(7:00-7:30)**
 - Discussion Items
 - 1) Policy 1st reading
 - GBM Staff Complaints
 - GBM-AR Staff Complaints - Procedure
 - 2) 1st Draft Annual Report for SFSD
7. Executive Session (7:30-8:00)

VISITORS: Meetings of the school board are for the members to conduct official school business. All meetings are open to the public, except executive sessions, which may be called according to Oregon law. Members of the public desiring to address the board are asked to contact the administrator at least one week in advance of the meeting. Large groups are asked to designate a primary spokesperson.



The Community Roots School Board Meeting
Sept. 12, 2023
Draft Minutes

Sarah read mission statement

Staff: Christen, Alyssa

Board Members: Matt, Jane, Virginia, Sarah, Jackie, Rebecca

Visitors: Desiree, Christina, Aaron

Consent Agenda: Matt motions and Virginia seconds minutes for August 1st. All approve

Audience Visitors: Alyssa shared a list of questions from the Owl class. Salmon unit will be another part of outdoor class. This week outdoor classroom was launched and they introduced non human species and it went really well. Seems like the year is off to a really good start.

Admin Report: 110 students enrolled and 111 to be enrolled soon. SPED services start on the 18th of Sept. CRS has been allocated \$41k to put towards early literacy. ADM allocation is \$7866.40. Kelly Hutchinson is the new Operations Manager and is the liaison for the PTO and fundraising committees. Medical insurance rates have increased 17%. And we are working on choosing another plan from the same provider that will meet our budget.

Fundraising: Christina shared about the upcoming Ofest food cart. They are picking up parking passes tomorrow. Set up starts on 9/13 at 6pm right across from ACE Hardware. Booth #33. Possibly a donation for the church for use of their kitchen.

PTO update from Aaron - they have registered with all proper entities to be a non profit. Meeting last Friday and the PTO had a 2 hour meeting and PTO is easing into the first year of existence. Trying to raise money through activities and not interfere with the fundraising committees. 4 members of PTO and fundraising committee has 2 members. Fundraising committee needs at least 2 more members.



The Community Roots School Board Meeting
Sept. 12, 2023
Draft Minutes cont.

Facilities: First meeting scheduled is next Thurs. 9/21. Replaced some carpets.

Finances: Audit materials are all uploaded, Irene will be phasing herself out of Finance committee at the end of the year. Bookmark budget review with updated numbers for next meeting. Choosing Health Insurance topic next meeting - look at comparables

Discussion: Facility - offer of purchase - Christen had a meeting with Silverton Friends Church and they are thinking about what their next steps are. We are planning on drafting a letter to them to feel out to see if purchasing the property would be something they would be interested in. Facilities committee will draft a letter and present it to the board.

Fiscal Policy - asking auditors to see what additional controls might be needed to use a debit or credit card. What would be a recommended credit limit?

Strategic plan - talked about celebrating all the progress we have made as a school and community. Board would like to plan a retreat. Christen will poll for a 4 hour time block on a Sunday in October or November.



The Community Roots School

October 2023

Administrator Report

Enrollment:

- Current: 108 students enrolled for 23/24 as of 9/7/23

1. **Enrollment**

- 109 students enrolled, with 2 students slated to relocate out of country by the end of December.
- 2 students transferred out to homeschool/online school
- 108 students is 17 more students then last year at this time.

2. **District Communication**

- School nurse Leslie Kuhn communicated out Nursing updates to families via Parent Square: namely highlights of the communicable disease plan.
- IT department has relocated the AV tech from the grange into the Upper Elementary classrooms

3. **Educational Accountability & School News**

- SBAC scores have been received from the state, and ODE At-A-Glance profiles narratives have been submitted. ODE to publish profiles to the public in mid-October. Overall, scores across the board (local, state, national) continue to be lower than pre-pandemic times. [Reports are located here.](#)
 - CRS = 60.6% proficiency ELA, 36.4% proficiency Math with a 63.5% participation rate.
 - SFSD = 54.4% proficiency ELA, 38.3% proficiency Math with a 90.9% participation rate
 - State = 43.0% proficiency ELA, 30.6% proficiency Math with an 88.8% participation rate
- Our Tier 2 support specialist is working with Guides on delivering the first round of iReady assessments to students in grades 3-6 in both Reading and Math.
- In partnership with Marion County Soil and Water Conservation District and Oregon Department of Fish and Wildlife, Community Roots' 6th year class participated in the annual Salmon Watch program on the Santiam River. They did various activities on-site including water testing (pH, turbidity, O2 levels), dissections, invertebrate studies, water ecology, and observing salmon spawning.
- SPED IEP and 504 work continues with Heather Gehring doing both push-in and pull-out services for students.
- Child Study meetings have begun and initial parent meetings + progress monitoring are ongoing.
- Lesson Study bi-monthly meetings have begun for Guides
- October in-service modules include WiseMind professional development for all staff, and iReady training (part 2) for Guides and Tier 2 Support Specialist.
- Lead teachers have been participating in a 3 session professional development course through Montessori Institute Northwest titled UNLOCKING LITERACY: Practical Applications of the Science of Reading in Montessori Elementary Classrooms presented by Zil Jaeger.
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4. **Budget & Finances**

- Currently, we are working on purchasing all the Auction items from the Giving Tree and Paddle Up. Those purchases will be used in this Fiscal Year. We are on track to have all purchasing complete by the end of October 2023.
- With the final accounting from Octoberfest, CRS netted ~\$1,900.

5. **Community& Fundraising**



- a. Observation calendar has been set and added to the website for people to schedule a time throughout the year.

6. Facilities

- a. Monthly facilities meetings have been scheduled for the school year between SFC and CRS
- b. An arborist is being scheduled by SFC to remove hazardous branches from the trees near the playground.
- c. Troubleshooting a faulty exterior speaker is ongoing. Coordinating with the IT department on the transmitters with the Visiplex intercom system.

7. HR

- a. 1:1 meeting with Christen have been scheduled for step 1 in the yearly staff appraisal process.
- b. 1:1 introductory meetings with Kelly Hutchinson have been scheduled for staff.
- c. Kelly and Christen are revising the staff handbook and aligning cross-referenced policies within it.
- d. Jim Meyers spoke with staff about Health Insurance Benefits with Providence and Moda. All interested staff have been enrolled and the new year starts 10/1.
- e. Resilient Educator workshop scheduled for InService day, presented by WiseMind. A Neuroscience meets Montessori offering.

**The Community Roots School
Statement of Financial Activities
As of 8/31/2023**

Description	Actual	Actual	Budget	
	7/31/2023	8/31/2023	Approved Budget	Working Budget
State School Fund—General Support	-	-	762,300.00	881,036.80
BEGINNING FUND BALANCE	-	-	-	-
SIA Funds	-	-	70,000.00	72,969.51
Literacy Allocation		-	-	41,690.33
Fundraising	278.00	2,153.00	100,000.00	71,962.87
Grants	-	-	1,000.00	1,000.00
Supply Fees	-	120.00	4,900.00	2,640.00
Other School Related Income	787.59	787.59	-	
Total Revenue	1,065.59	3,060.59	938,200.00	1,071,299.51
General Funding				
Salaries	(7,147.08)	(7,147.08)	(481,513.11)	(525,684.43)
Substitute & Temporary Wages	-	-	(16,770.00)	(16,770.00)
Benefits	(1,242.45)	(1,242.45)	(158,448.41)	(175,150.94)
PERS	(1,093.50)	(1,093.50)	(92,419.11)	(108,488.92)
Computer Expenses	-	-	-	-
Consumable Supplies and Materials	(3.48)	(3.48)	(12,120.00)	(12,120.00)
Dues and Fees	-	-	(2,100.00)	(2,100.00)
Insurance	(7,282.00)	(7,282.00)	(7,900.00)	(7,900.00)
Professional Development	-	-	-	-
Professional Services	(3,800.00)	(3,800.00)	(14,100.00)	(14,100.00)
Rent	(4,328.14)	(4,328.14)	(44,400.00)	(45,096.00)
Custodial Supplies/Services	-	-	(11,000.00)	(11,000.00)
Repairs and Maintenance	(2,963.99)	(2,963.99)	(2,000.00)	(2,000.00)
Transportation	-	-	(1,000.00)	(1,000.00)
Utilities	(259.00)	(259.00)	(6,660.00)	(6,660.00)
Other Expense	-	-	(1,500.00)	(1,500.00)

Total General Funding	(28,119.64)	(28,119.64)	(851,930.63)	(929,570.29)
<i>Literatecy Allocation 23/24</i>				
Licensed Salary (MH)		-	-	(41,690.33)
Total Literacy Allocation	-	-	-	(41,690.33)
<i>SIA Funds</i>				
Professional Development - SIA	-	-	(5,000.00)	(9,113.56)
Intervention Programs/STAR	-	-	(4,513.63)	(1,613.25)
Non-Licensed Salary - Specialist	-	-	(31,737.84)	(31,723.37)
Employer Burden (health and Other) - Specialist	-	-	(28,748.53)	(30,519.33)
Total SIA Funds	-	-	(70,000.00)	(72,969.51)
<i>Citizen Bank</i>				
Fundraising Expense	(688.72)	-	-	-
Merchant Fees	-	-	-	-
Fund Purchase	-	-	(1,000.00)	(1,000.00)
Other School Related Expense	-	(2,531.10)	-	-
Total Citizen Bank	(688.72)	(2,531.10)	(1,000.00)	(1,000.00)
<i>Cont Fund 1.25% of SSF Revenue</i>	-	-	(9,528.75)	(11,012.96)
<i>Reserve Fund .6% off of SSF Revenue</i>	-	-	(4,573.80)	(5,286.22)
Total Expense	(28,808.36)	(30,650.74)	(937,033.18)	(1,061,529.31)
Net Revenue (Expense)	(27,742.77)	(27,590.15)	1,166.82	9,770.20
Citizens Bank Balance	252,547.95	252,700.57		

Staff Complaints - Procedures

Every CRS (or Charter school?) employee shall have the right of access to the Board without reprisal by the Board of any CRS (or charter school?) employee.

It is expected that complaints will be resolved at the lowest possible level and that the use of these procedures will be limited to situations for which no other process is available.

An employee claiming a violation, misinterpretation or inappropriate application of district personnel policies and/or administrative regulations is to follow the procedural timelines and steps outlined below.

Step 1: An employee of the public charter school who wishes to express a concern should discuss the matter with the public charter school employee involved.

Step 2: If the concern remains unresolved, an employee with a complaint shall first discuss it with the HR/Operations Manager within 20 school days of the complaint or of learning of the complaint, with the objective of resolving the matter informally. If the complaint is against the HR/Operations Manager, the complaint should be referred to the Administrator.

If the employee is not satisfied with the disposition of the complaint, he/she may file a written complaint with the HR/Operations Manager within 10 days following the informal discussion. This complaint shall set forth the grounds upon which the complaint is based and the reasons why the employee considers the informal decision unacceptable. The HR/Operations Manager shall communicate a decision in writing or in electronic form within 5 days to the employee.

Complaints against the HR/Operations Manager should be filed with the Administrator within 10 days following the informal discussion. The Administrator shall communicate a decision in writing within 5 days to the employee.

Step 3: If the employee is not satisfied with the disposition of the complaint at Step 2, or if no decision has been rendered within 10 days after the complaint was delivered to the HR/Operations Manager or Administrator, he/she may, within 5 days after a decision by the HR/Operations Manager or Administrator, whichever is sooner, appeal in writing that the complaint be heard before the Board. The Board may schedule the matter for hearing at its next regular meeting following receipt of the complaint or at a mutually agreed time.

The number of days at each step will be considered as a maximum. Time limits may be extended by mutual consent of both parties. The parties will make every reasonable effort to expedite the processing of complaints.

OSBA Model Charter School Sample Policy

Code: GBM

Adopted:

Staff Complaints *

The administrator will develop a complaint procedure which will be available for all employees who believe there is evidence of, and wishes to report a violation, misinterpretation or inappropriate application of public charter school personnel policies and/or administrative regulations; a mismanagement, gross waste of funds or abuse of authority; or believe there is evidence the public charter school created a substantial and specific danger to public health and safety by its actions. The complaint procedure will provide an orderly process for the consideration and resolution of problems in the application or interpretation of public charter school personnel policies.

~~The complaint procedure will not be used to resolve disputes and disagreements related to the provisions of any collective bargaining agreement, nor will it be used in any instance where a collective bargaining agreement provides a dispute resolution procedure.~~ Disputes concerning an employee's dismissal, contract nonrenewal or contract nonextension will not be processed under this procedure.

Reasonable efforts will be made to resolve complaints informally.

Administrative regulations will be developed to outline procedural timelines and steps under this policy, as necessary. The public charter school will use the complaint process in GBM-AR Staff Complaints - Procedure to address any alleged violations of this policy.

END OF POLICY

Legal Reference(s):

[ORS 338.115](#)

[ORS 659A.199 to -659A.224](#)

[OAR 581-022-2405](#)

Anderson v. Central Point Sch. Dist., 746 F.2d 505 (9th Cir. 1984).

Connick v. Myers, 461 U.S. 138 (1983).

¹ If the district employs the public charter school staff, review any language included in the sample policy to confirm it does not conflict with requirements provided in the related collective bargaining agreements, and keep this language if applicable.

The Community Roots School

Charter School Annual Report

2022-23 School Year

Contents:

1. CRS History and Summary of 2022-23
2. Mission Statement
3. Innovative Learning Environment, The Montessori Pedagogy Overview
4. Board of Directors
5. School Configuration and Enrollment
6. Policy Development Issues
7. Staffing and Professional Opportunities for Teachers
8. Student Opportunities, Learning, Achievements and Performance
9. Oversight Visits and Additional School Performance Data
10. Financials
11. Charter Contract Compliance Requirements
12. Goals Outlined in ORS 338.015
13. Accomplishment of Goals for 2022-23
14. Montessori

Appendices:

1. Sample Student Report Card
2. ODE Report Card
3. 2022-23 Approved Budget
4. Budget Report End of the Year
5. 2022 Audit Financial Report

This annual report provides a comprehensive picture of the recently completed academic year, 2022-23. 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 2022/23

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, chickens, and a compost bin at the main campus on Eureka. CRS also offered Chess Club and a variety of student-led events (Talent Show, Trivia Night, Murder Mystery Play)

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 The Silverton Grange for the 2022-23 school year.

In 2022/23 CRS had 96 students in one Kindergarten classroom, two lower elementary classrooms (1st – 3rd), a combined upper elementary classroom (4th – 6th), and 1 Adolescent classroom (7th & 8th). CRS continues to 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 2022-23 school year, we maintained the classroom configurations (both online and in-person) 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 2022-23 school year, was composed 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).

21-22 CRS Board Members:

Sarah Brown – Chair

Jackie Kemp – Treasurer

Jackie joined the CRS board in 2020, after learning about the school when she was managing the Charter School grants for the Oregon department of Education. Jackie is a graduate of the University of Hawaii West Oahu with a degree in Professional Studies, in 2001 she completed a Masters of Arts in Curriculum and Administration for Education at Gonzaga University. In 2016 Jackie and her husband Greg relocated to Silverton from the windward side of Oahu, Hawaii. Jackie is passionate about education, and that every child should be given the opportunity to develop a lifelong enjoyment of learning and discovering about the world around them.

Matt Eberle - Secretary

Matt joined the CRS board in early 2022, Matt is a graduate of University of North Carolina at Wilmington with a BS in Marketing. In 2016, Matt and his wife Kecia relocated to Oregon from Honolulu, HI with their twin girls. The move prompted an opportunity to join the family business where he is now the Chief Operations/Digital Officer for the Killers Pest Control. Matt looks forward to growing relationships in the Silverton area and helping Community Roots continue to provide an enriching educational experience for all our students.

Virginia Griffin – Board Member

Virginia brings experience starting and helping to run a nonprofit Montessori Primary program (ages 3-6) at Silver Creek Montessori, as well as professional background as an attorney. Virginia attended Montessori schools from age 2.5 through 13 and attributes her later academic success and love of learning to her Montessori experience. She is passionate about Montessori education, and wants to help with the work of bringing an opportunity for free authentic Montessori education to every child in the Silver Falls School District.

Jane Zhen - Board Member

Jane joined the CRS board in 2021. Jane graduated Emory University with a degree in Accounting. She relocated to Silverton in 2014 from Atlanta, Georgia and has two children currently attend Community Roots School. In addition to her professional background as an accountant, she brings prior experience as a Treasurer at the Silverton Indoor Park and Silver Creek Montessori. She wants to share the joy as a parent of children who are capable and self-motivated in their learning and help bring child-focused education to all children in the community through supporting the continued success of the School.

Board Meetings

The Community Roots School Board meets on the first Tuesday of each month at 6:30 p.m. at the CRS campus or held online. 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 many board meetings to board training, including journal reviews, team building and further education. As well, board development meetings are held on alternate dates as well. Topics covered in board trainings included finance, board orientation, and various other trainings (DEI, OSBA).

5. School Configuration and Enrollment

96 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 classroom is 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.

Enrollment for 2022-23

Enrollment forms for 2022-23 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 27 students for the 2022/23 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 2022/23

7:50	Bus Arrives
7:50-8:15	Early Morning Care for students arriving by bus
8:00	Middle School instruction begins
8:15-8:30	Students Arrive
8:30	Morning three hour work cycle & instruction
11:30 - 12:30	Lunch and Recess
12:45-3:15	Afternoon work cycle & instruction
3:15	School day ends - children dismissed to car line, bus, or walking.

Community Roots largely follows the SFSD calendar, including in-service days, conferences, breaks, and holidays. Community Roots has an early release (noon dismissal) every Monday that school is in session. Monday afternoons are reserved for professional development, meetings, lesson planning and recordkeeping for staff.

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 - 2023 – Handbooks and policies are continuously 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 2022-23 school year, staff included five full time teachers, 5 part time assistants, a full time administrator, a full time office manager, and a Garden Program Specialist. Ali Wigowsky led our Kindergarten classroom; she has a public school and Waldorf school educational 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, also with public school training, is the school’s other lower elementary teacher and has previously worked at CRS as a classroom assistant for a number of years. Additionally, she holds a Diploma from CGMS in Montessori Elementary Education. Ginnie Vigansky continued at CRS as an Upper Elementary teacher, having previously taught at a Montessori school in Corvallis. Ginnie holds an AMI diploma in Montessori Elementary education, and an Oregon Charter school registry with TSPC. Bridgett Steveson guides our middle school program. She has Montessori certification for the Adolescent level, and an Oregon charter school registry with TSPC.

Each classroom was staffed with a part time assistant for 7.5 hours a day. Our garden specialist, Alyssa Burge, divided her time between the outdoor educational environment and working as needed with students in other classrooms. 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. Christen Kelly returned as the Administrator. Gwen Hill was hired as the Office Manager. SpEd intervention support was managed by SFSD employee Christine West (case manager) and Heather Gehring (SNA).

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 from CRS. Students were routinely assessed throughout the year using the district's STAR assessment. It has been found to be a 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. During the shift in learning transitioning out of COVID times, modifications were made to incorporate more SEL narratives as well.

Highlights of the children's year included returning to campus for full-time in person instruction, making connections with peers, teaching staff, and their indoor/outdoor environments, Recharge Cafe, Trivia Night, and the Middle School performance of a murder mystery play. The year concluded in June with field day, family picnic, and 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. A graduation ceremony was held outdoors for our 8th grade students who were moving up to the High School.

In late spring, the children resumed 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 ELA section of the SBAC with a focus on the new writing

requirements. The SBAC results for the 2022-23 school year shows room for growth in the area of mathematics. CRS staff will be utilizing data from the STAR assessment to provide feedback to staff in areas of individual growth as we prepare for SBAC. For specific questions regarding the ODE report card, please contact Christen Kelly.

CRS was able to retain 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.

9. Oversight Visits and Additional School Performance Data

The Community Roots School Administrator, Christen Kelly, presented the a Principal Report to the Silver Falls School District Board on April 10, 2023 to update them on the school's 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.

With the aid of SIA funds, CRS has been able to contract with multiple agencies to provide support and professional development for the school.

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. CRS continues to use DERS (Developmental Environment Rating Scale) to assess classroom learning environments on a regular basis.

10. Financials

Budgets

In April 2022, Community Roots School submitted its SSF operational budget, for the 2022-23 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 2022.

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 (or more) community members, 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 – Jackie Kemp, Administrator – Christen Kelly, Community Member - Irene Schmuker, Board Member –Jane Zhen were charged with the oversight of the school’s finances for the 22-23 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 2022-2023 school year, 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 had provided oversight of the use of these funds. The grant closed out in December 2020.

- 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 staff. Fundraising events were diverse in 2022-23 and an estimated \$88,900 was raised by the fundraising efforts. In 2022-23 fundraising dollars were expected to contribute to areas of need such as classroom materials, the outdoor program, and facilities. The paddle up from the annual auction in the Spring of 2023 funded enrichment opportunities for the students.

Fundraising efforts include wreath and Poinsettia sales, Giving Tuesday, purchasing ability through Amazon Smile, Box Tops for Education, blue bag bottle drop, annual auction, and a plant 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." We hosted several fundraising activities that brought the community and school together including a plant sale fundraiser (with flowers, veggie starts, and trees from our school garden that the children prepared, as well as hanging baskets from a local nursery), a holiday wreath sale, and a successful annual Auction. Our middle school students also hosted Trivia Night, host Architects in the Classroom each year, and participated in Outdoor School.

The upper elementary students held a fundraiser, Pennies for Patients, to help support children through the Leukemia & Lymphoma Society. They also host Architects in the Classroom each year, and participate in Outdoor School. For the 2021/222 school year, our 4-6th grade students went to Straub Outdoor School on the Oregon Coast.

The in-town location has allowed our classrooms to explore the community beyond the 4 walls of our school. Classes took multiple walking trips to the park, and worked in the garden. Our upper elementary students' "going out" program, which allows our 4th – 6th graders learning opportunities outside the classroom was welcomed back after a brief COVID related hiatus.

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). In the 2020-21 school year, staff and board took the information from the report and began creating a strategic plan of support and accountability. In 2022-23 The Board and Leadership team met in a work session and created a roadmap forward focusing our strategic plan on three key areas: Thriving Students and Staff, Wise Operations, Engaged Community. After careful deliberation and mindful consideration, the decision to close the Middle School program at the end of the 2022-23 academic year. This allows the school to reallocate those resources back into strengthening the K-6 program and aligns with strategic plan goals and desired outcomes.

Active Parent Participation

Community Roots Parents show commitment to the school and their children's education and contribute in many capacities. Parent participation was encouraged through community education events, meetings with teachers, community building events and fundraising events. Community education events included Family Engagement sessions where staff introduced Montessori concepts and curriculum to family members. Community building events included a student-led Trivia night and play performance.

Parents were also encouraged to support their child's learning by attending the bi-annual parent-teacher conferences. Fundraising and Community Building events often coincide and range from a plant sale to our annual auction.

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 2021-22

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 20-21 school year included Seth Webb, a Montessori consultant from NCMPS, supporting our staff with the results of the previous year's audit. In 19/20 he conducted 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. In 20/21 he conducted SWOT focus groups with our school community and supported us in developing a draft of our Strategic Plan priorities for CRS. Our school continued these procedures and practices for the 21-22 school year:

- 1) Child Study – in depth study by a team
- 2) New Progress Reports – Focus on Social/Emotional Fluency, Executive Functions, and Critical Thinking Skills
- 3) Normalization/Adjustment Checklist– ability of a child to access Montessori curriculum
- 4) Montessori Assistant Training for every assistant
- 5) 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