SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Location:
***This meeting will be held online at*:**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,,,0#,,150836# US (San Jose)
+13462487799,,5245217471#,,,,,,0#,,150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington D.C)
Passcode: 150836

Date/Time: **Thursday, August 19, 2021 – 6:00 p.m.**

**AGENDA**

**A. CALL TO ORDER** (6:00)
**A.1 Roll Call** Russell Shapiro, Beth Hammer

**B. CONSENT AGENDA** (6:05)
**B.1 Minutes Approval** Consider approval of minutes from Special Meeting, August 2, 2021 and Regular Meeting, June 17, 2021.
**B.2 Employee Handbook Approval** Consider approval of the 2021-2022 Employee Handbook.
**B.3 MOU with Blue Oak for School Psychologist Services** Consider approval of a revised contract for School Psychologist services with Blue Oak for the 2021-2022 school year.
**B.4 Policy for the Education of Children Who are Homeless**
The Board will consider adopting a Policy for the Education of Children Who are Homeless.
**B.5 Consolidated Application**
The Board will be asked to approve the Consolidated Application for categorical programs.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6.25)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 School Director Report**

**E.2.2 Treasurer Report**

**E.3 Action/Discussion Items** (6:45)

**E.3.1 Appointment of Directors**

The Board will consider appointing directors to open seats on the board.

**ACTION REQUESTED**: Appoint directors.

**E.3.2 Election of Officers** (6:50)

The Board will elect officers.

**ACTION REQUESTED:** Elect officers.

**E.3.3 Independent Study Program** (7:00)

The Board will consider an Independent Study Program.

**ACTION REQUESTED:** Approve implementation of an Independent Study Program.

**E.3.4 ESSER III Expenditure Plan** (7:15)

The Board will be asked to discuss the ESSER III Expenditure Plan.

**ACTION REQUESTED**: Discuss plan.

**G. FUTURE AGENDA ITEMS**

The Board will welcome newly elected members.

The Board will engage in retreat planning.

**H. ADJOURNMENT** (7:30)

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SHERWOOD MONTESSORI

**SPECIAL MEETING NOTICE OF THE BOARD OF DIRECTORS**

Location:
***Due to Shelter in Place orders, this meeting will be held online at*:**

Join Zoom Meeting
https://csuchico.zoom.us/j/83456860577?pwd=ZTNVTkpjb1RXc0NzVkFMUEl5L1lMZz09
Meeting ID: 834 5686 0577
Passcode: 068265
One tap mobile
+16699006833,,83456860577#,,,,*068265# US (San Jose)

Date/Time: **Monday, August 2, 2021 – 6:00 p.m.**

**AGENDA**

**A. CALL TO ORDER** (6:00 p.m.)
**A.1 Roll Call**

**B. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA**
Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**ADJOURNMENT of Public Meeting**

**C. CLOSED SESSION** Annual review of School Director and discussion of contract and compensation

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SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Location:
***This meeting will be held online at*:**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
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Dial by your location
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+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington D.C)
Passcode: 150836

Date/Time: **Thursday, June 17, 2021 – 6:00 p.m.**

**MINUTES**

**A. CALL TO ORDER** (6:00)

**A.1 Roll Call** Russell Shapiro, Rosie Paulson, Mariah Ross-Walcott, Brandy Thomas, Beth Hammer

*Meeting was called to order at 6:17 by Russell Shapiro; Brandy Thomas,* Mariah Ross-Walcott

**B. CONSENT AGENDA** (6:05)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, May 20, 2021

**B.2 MOU with Chico Country Day School** Consider approval of contract for nursing services for the 2021-2022 school year.

**B.3 Contract for Business Management Services** Consider approval of contract for business management services for the 2021-2022 school year.

*Mariah Ross-Walcott motioned to approve agenda, Russell Shapiro seconded with a unanimous approval by present board members.*

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**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications**

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 School Director Report**

**E.2.2 Treasurer Report**

*Michelle Yezbick presented School Director report. Pat Casey presented the Treasurer report. The board reviewed the written reports and engaged in discussion.*

**E.3 Action/Discussion Items** (6:40)

**E.3.1 Adoption of Original Budget for 2021-2022**

The Board will be asked to adopt the original budget for 2021-2022.

**ACTION REQUESTED**: Adopt Budget.

*Pat Casey presented original budget for 2021-2022, discussion followed. Brandy Thomas moved to approve, Mharia Ross-Walcott seconded, with unanimous Board approval of present members.*

**E.3.2 Adoption of Local Control Accountability Plan (LCAP)** (6:55)

The Board will be asked adopt the LCAP.

**ACTION REQUESTED:** Adopt LCAP.

*Michelle Yezbick presented LCAP, discussion followed. Brandy Thomas moved to approve, Russell Shapiro seconded, with unanimous Board adoption of present members.*

**E.4 Board Governance** (6:50)

**E.4.1 Discussion of Board Duties**

*Russell Shapiro presented Proposed Change to Sherwood BOD Bylaws regarding Elections; discussion followed. A recommendation for a discussion on a representative board will occur at a future meeting. Brandy Thomas moved to approve, Russell Shapiro seconded, with unanimous Board approved of present members.*

*Russell Shapiro discussed defining roles of board, director and staff at future meeting. Brandy Thomas recommended moving equity discussion to the top of the agenda so it is not tabled when meetings run longer than expected.*

**G. FUTURE AGENDA ITEMS** (7:10)

The Board will welcome new members.
The Board will engage in retreat planning.

**H. CLOSED SESSION** (7:15)

With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director.

*Board met in a closed session at 7:30PM. No decisions were made.*

**I. ADJOURNMENT** (7:30)

Board returned to open session at 8:04PM. Meeting adjourned at 8:04PM.

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**Agenda Item B.2**

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Employee Handbook**

**Date:** August 19, 2021

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**SUMMARY**

Revisions in the Employee Handbook are submitted for approval.

**DISCUSSION**

The following changes were made to the Employee Handbook:

| **Change** | **Rationale** |
|---|---|
| Job descritions changed | Director of MTSS added, Paraprofessional Aide added, Tutor-Child Care added |
| Guidance & Discipline | Added language about playground supervision (moved from Security & Emergency Protocols section) |
| Indpendent Study | Revision in Independent Study to reflect current proposed changes in law and the lack of availability of Independent Study at this time. |
| Hours of Work, Breaks, Overtime, and Paydays | Update in minimum wage. |
| Temporary Remote Work Policy<br>Return to Work Policy | Omited |
| COVID-19 Related Workplace Mandates | Includes language describing the expectation that employees will follow mandates and process for inititating reasonable accomodations. |
| Field Trips | Language added regarding transportation of students during pandemic. |

| | |
|---|---|
| Employee Benefits | Language clarified to indicate who is eligible for benefits. |

**ACTION REQUESTED**

Approve revisions to Employee Handbook.

Attachments: Redline copy of 2021-2022 Emplyee Handbook

SHERWOOD MONTESSORI

# Employee Handbook

~~2020-~~2021-2022

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~~Temporary Remote Work Policy~~
~~Return to Work Policy~~

## About this Document

The policies stated in this Handbook are intended as guidelines only and are subject to change at the sole discretion of the Director of the school through Board Action in consult with Sherwood Montessori Board of Directors. All staff members are responsible for upholding the policies and procedures stated herein, and in the Safety Plan, Family Handbook and/or other procedural documents. Those guidelines should be read carefully, and questions should be asked to the Director for clarification.

## Mission Statement

The mission of the Sherwood Montessori is to educate K-8 students of the greater Chico area by providing Montessori education within the context of mutual respect and joy. The focus of the education will be on engaging critical thinking and fostering empathy, and developing the skills needed to become competent, responsible citizens who are life-long learners and skillful problem solvers.

The school will serve our community by providing a rich and supportive educational environment for children based upon the philosophy of Maria Montessori which allows each child to reach his or her own potential academically, personally, and socially and will focus on educating the whole child intellectually, physically, and psychologically. The methodology used will develop a firm foundation for the students, and will emphasize ethics, initiative, persistence, and self-confidence.

This mission will be accomplished by a concerted community-based effort between the school, the parents, and the individual child.

*Core Values*

To successfully implement and sustain this mission, the school will be founded on the following core values:

- To creatively apply the Montessori method toward reaching high academic standards, while emphasizing core subjects
- To maintain a diverse total school population through inclusive mixed-aged, mentor-based classrooms that welcome all students
- To place emphasis on collaboration, problem-solving, and self-directed goal-setting for each Montessori student according to developmental readiness
- To nurture a commitment toward sustainability and environmental awareness locally and globally, both in Chico and in the greater world
- To apply firm standards of conduct, emphasizing mutual respect, honesty, and courtesy
- To employ creative, passionate, and engaged teachers who are committed to the Montessori philosophy
- To nurture high parental involvement and collaboration in all areas of education and governance

## Equal Employment Opportunity/Non-Discrimination Policy

Sherwood Montessori is a non-profit, 501(c) 3 organization. We value, welcome and celebrate a diverse population. The school treats all employees and applicants for employment without unlawful discrimination as to race, creed, color, national origin, age, disability, marital status, or sexual orientation in all employment decisions.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, Sherwood will make reasonable accommodations for the known limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

Any applicant or employee who requires an accommodation in order to perform the essential functions of the job should contact the Director with day-to-day personnel responsibilities and request such an accommodation. The individual with the disability should specify what accommodation he or she needs to perform the job. Sherwood then will conduct an investigation to identify the barriers that interfere with the equal opportunity of the applicant or employee to perform his or her job. Sherwood will identify possible accommodations, if any, that will help eliminate the limitation. If the accommodation is reasonable and will not impose an undue hardship, Sherwood will make the accommodation.

## Sexual Harassment Policy

Sexual harassment in employment violates the provisions of Title VII of the Civil Rights Act of 1964. Any employee who is aware of any instance of sexual harassment should report the alleged act immediately to the Director. All complaints will be investigated promptly, impartially and discreetly and, upon completion of the investigation, the appropriate parties will be notified immediately of the findings. If the complaint is against the Director, the Chair of the Board of Directors shall initiate an investigation. The School will not tolerate any forms of discrimination and harassment by anyone. No words, acts or symbols of racial or gender discrimination will be allowed. Proven harassment because of an individual's race, color, religion, gender, national origin, age disability or sexual orientation will not be tolerated and may result in disciplinary action up to and including termination.

Sherwood employees are expected to comply with SB 1343 which requires two hours of Mandatory Training for Supervisors and one hour of Mandatory Training for Non-Supervisors within 6 ~~months~~weeks of hire. Continuing employees will need to update training every two years. Hourly employees should show this training on a time sheet and will be compensated at their hourly rate. Time to take the training should be scheduled with consult with one's immediate supervisor.

Any employees who have not completed this training within 6 ~~months~~weeks of hire will be placed on leave with no pay until the training is completed.

## Boundaries Policy

DISCIPLINARY PHYSICAL CONTACT WITH STUDENTS

It is the policy of Sherwood Montessori that no teacher or other staff member will use corporal punishment against a student. This prohibition includes spanking, slapping, pinching, hitting, tying, taping, or the use of any other physical force as retaliation or correction for inappropriate behavior.

STAFF-STUDENT INTERACTIONS

While the use of appropriate touching is part of daily life and is important for student development, teachers and other staff members must ensure that they do not exceed appropriate behavior. If a child or other staff member specifically requests that he or she not be touched, then that request must be honored without question.

Boundaries Defined

For the purposes of this policy, the term "boundaries" is defined as acceptable professional behavior by staff members while interacting with a student. Trespassing beyond the boundaries of a student-teacher relationship is deemed an abuse of power and a betrayal of public trust.

Acceptable and Unacceptable Behaviors

Some activities may seem innocent from a staff member's point-of-view but could be perceived as flirtation or sexual insinuation from the perspective of students or parents. There is no single reasonable person standard. The purpose of the following lists of unacceptable and acceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to or may be perceived as inappropriate, or sexual misconduct, or "grooming." Grooming is defined as an act or series of acts by a sexual predator to gain physical and/or emotional control by gaining trust (of staff and/or family and a minor) and desensitizing the minor to various forms of touching and other intimate interaction.

Staff members must understand their own responsibilities for ensuring that they do not cross the boundaries as written in this policy. Violations could subject the teacher or staff member to discipline up to and including termination. *Disagreeing with the wording or intent of these established boundaries will be considered irrelevant for any required disciplinary purposes.* Thus, it is critical that all employees study this policy thoroughly and apply its spirit and intent in their daily activities.

Unacceptable Behaviors

These lists (and any subsequent lists) are not meant to be all-inclusive, but rather, illustrative of the types of behavior intended to be addressed by this policy.

1. Giving gifts of a personal and intimate nature (including photographs) to a student; or items such as money, food, outings, electronics, etc. without the written pre-approval of the School Director. It is recommended that any such gifts be filtered through the Director along with the rationale therefor.
2. Kissing of ANY kind
3. Massage [Note: Prohibited in athletics unless provided by massage therapist or other certified professional in an open public location. Coaches may not perform massage or rub-down. Permitted in special education only as instructed under an IEP or 504 Plan.]
4. Full frontal or rear hugs and lengthy embraces
5. Sitting students on one's lap (grades 3 and above)
6. Touching buttocks, thighs, chest or genital area
7. Wrestling with students or other staff member except in the context of a formal wrestling program
8. Tickling or piggyback rides
9. Any form of sexual contact
10. Any type of unnecessary physical contact with a student in a private situation
11. Intentionally being alone with a student away from school
12. Furnishing alcohol, tobacco products, or drugs - or failing to report knowledge of such
13. "Dating" or "going out with" a student
14. Remarks about physical attributes or physiological development of anyone. This includes comments such as "Looking fine!" or "Check out that [body part]."
15. Taking or requesting photographs or videos of students for personal use or posting online
16. Either partially or fully undressing in front of a student or asking a student to undress, with the intent to view/expose private body parts
17. Leaving campus alone with a student for lunch
18. Sharing a bed, mat, or sleeping bag with a student
19. Making, or participating in, sexually inappropriate comments
20. Sexual jokes, or jokes/comments with sexual overtones or double-entendres
21. Seeking emotional involvement (which can include intimate attachment) with a student beyond the normative care and concern required of an educator.
22. Listening to or telling stories that are sexually oriented
23. Discussing your personal troubles or intimate issues with a student

24. Becoming too involved with a student so that a reasonable person may suspect inappropriate behavior
25. Giving students a ride to/from school or school activities without the express, advance written permission of the Director and the student's parent or legal guardian
26. Being alone in a room with a student at school with the door closed and/or windows blocked from view
27. Allowing students at your home and/or in rooms within your home without signed parental permission for a pre-planned and pre-communicated educational activity which must include another educator, parent, or designated school volunteer
28. Staff mirroring the immature behavior of minors
29. Sending emails, text messages, social media responses, making phone calls, or sending notes or letters to students if the content is not about school activities. Communication via private social media accounts is not acceptable.

**This policy does not prevent:** 1) touching a student for the purpose of guiding them along a physical path; 2) helping them up after a fall; or 3) engaging in a rescue or the application of Cardio Pulmonary Resuscitation (CPR) or other emergency first-aid. Nor does it prohibit the use of reasonable force and touching in self-defense or in the defense of another. Restraining a child who is trying to engage in violent or inappropriate behavior is also allowed. Only such force as necessary to defend one's self, another person, or the child or to protect property is legally permitted. Excessive force is prohibited.

<u>Acceptable Behaviors</u>

1. Pats on the shoulder or back
2. Handshakes
3. "High-fives" and hand slapping
4. Touching face to check temperature, wipe away a tear, remove hair from face, or other similar types of contact
5. Placing TK through second grade students on one's lap for purposes of comforting the child for a short duration only
6. Holding hands while walking with small children or children with significant disabilities
7. Assisting with toileting of small or disabled children in view of another staff member
8. Touch required under an IEP or 504 Plan
9. Reasonable restraint of a violent person to protect self, others, or property
10. Obtaining formal written pre-approval from Director to take students off school property for activities such as field trips or competitions, including parent's written permission and waiver form for any sponsored after-school activity whether on or off-campus
11. Emails, text-messages, phone conversations, and other communications to and with students, if permitted, must be professional and pertain to school activities or classes (communication should be initiated via transparent [non-private] school-based technology and equipment)
12. Keeping the door wide open when alone with a student
13. Keeping reasonable and appropriate space between you and the student
14. Stopping and correcting students if they cross your own personal boundaries, including touching legs, or buttocks, frontal hugs, kissing, or caressing
15. Keeping parents informed when a significant issue develops about a student, such as a change in demeanor or uncharacteristic behavior
16. Keeping after-class discussions with a student professional and brief
17. Immediately asking for advice from senior staff or administration if you find yourself in a difficult situation related to boundaries
18. Involving your direct supervisor in discussion about boundaries situations that have the potential to become more severe (including but not limited to grooming or other red flag

behaviors observed in colleagues, written material that is disturbing, or a student's fixation on an adult) Making detailed notes about an incident that in your best judgement could evolve into a more serious situation later

19. Recognizing the responsibility to stop "Unacceptable Behaviors" of students and/or co-workers
20. Asking another staff member to be present, or within close supervisory distance, when you must be alone with a student after regular school hours
21. Prioritizing professional behavior during all moments of student contact
22. *Asking yourself if any of your actions, which could be contrary to these provisions, are worth sacrificing your job and career.*

Boundaries Reporting

When any staff member, parent, or student becomes aware of a staff member (or volunteer, guest, vendor) having crossed the boundaries specified in this policy, or has a strong suspicion of "grooming behavior," he or she must report the suspicion to the Director promptly. "Grooming behavior" is an attempt to build an emotional and/or physical connection with a minor to gain their trust for the purpose of sexual abuse. "Suspicion" means something perceived in spite of inconclusive or slight evidence. It is based on facts that would lead a reasonable person to believe that a violation of the boundaries policy occurred. Prompt reporting of "unacceptable behaviors" observed in adult interactions with minors is essential to protect students, staff, any witnesses, and the school as a whole. When observant staff members call attention to a boundaries violation(s), the likelihood of harm is greatly reduced.

Child Abuse / Sexual Abuse Reporting (Mandatory Reporting)

If, within your professional capacity or within the scope of your employment, you observe or gain possession of knowledge that a child has been a victim of child abuse or sexual abuse (or you reasonably suspect it), **California Penal Code Section 11166 requires YOU to immediately report this information or suspicion directly to your county child protective agency (CPS) or local police/sheriff**. The report shall be made by phone immediately, and a subsequent written report must be sent within 36 hours of your knowledge or suspicion of the abuse.

You do not need permission to report. No supervisor or administrator can impede or inhibit a report or sanction you for making the report. Your report is confidential, and you are protected from liability as long as you do not discuss the matter with anyone other than law enforcement, CPS and your school's designated responsible administrative person. Failure to meet your reporting obligation can result in a monetary fine and/or jail.

Internal reporting to the Director occurs after the phone-in report is made to the police/sheriff or CPS.

Internal Investigations

The Director will promptly communicate with the investigating enforcement agency to determine whether an investigation will be conducted by that agency. The administrator will confirm with law enforcement as to whether the initiation of an internal school investigation would interfere with any criminal investigation. Only law enforcement has the authority to grant clearance to investigate the matter administratively.

Upon receiving information from the mandated reporter, the designated responsible administrator must take immediate action to stop the alleged inappropriate conduct — by removing the employee (or volunteer/vendor/guest) from the classroom or worksite when there is a potential risk to student or school safety. The Director shall consult with legal counsel as appropriate, prior to, during, and after conducting any investigation.

Consequences

Staff members who have violated this policy will be subject to appropriate disciplinary action, and where appropriate, will be reported to authorities for potential legal action.

## Substance/Tobacco Use Policy

All use or possession of any alcoholic or illegal substance on School grounds or reporting to work while under the influence of intoxicants or drugs will not be tolerated. Use or possession is grounds for immediate dismissal. Any observed use or possession is to be reported directly and immediately to the Director. Failure to do so can be cause for immediate termination. Sherwood Montessori is a smoke-free workplace. All School buildings, grounds, and facilities are nonsmoking/non-vaping areas. Additionally, smoking or vaping is prohibited within 20 feet of the school's playgrounds and the building's entrances, exits, and windows.

## Job Descriptions

The following job descriptions may describe duties assigned to an employee or to an independent contractor. Inclusion of independent contractors' duties in this *Employee Handbook* do not change the status of the individual from independent contractor to employee. The job descriptions of independent contractors are included herein to provide clarity regarding responsibilities.

**Director**

The role of the School Director is to foster a positive and collaborative school community with a commitment to the Montessori philosophy and methods. The Director is responsible for managing a strong team of educators and professionals who, in partnership with engaged families, strive to help all students achieve their highest potential. The Director leads both internally and externally, with responsibility for the following areas:

**Educational Program**

- Develop and maintain the quality implementation of Montessori pedagogy and curriculum
- Build consistency, coherence and continuity within and across school programs
- Set clear goals for student growth and success; implement strategies to achieve these goals
- Use and interpret assessments to monitor student growth and to inform instructional practices
- Analyze and use data, including "best practices," to support continuous process improvement
- Promote a supportive and respective learning environment for all students
- Ensure a system of intervention and supports for a range of student needs
- Ensuring coherence among grade levels of academic experiences of students, e.g.: ensuring that students in lower and upper elementary classrooms experience full complement of the Five Great Montessori Lessons.
- Supporting classroom teachers to implement assessments, analyze results, and make instructional choices based on data.
- Ensuring coherence in learning environments in terms of Montessori authenticity and Montessori materials appropriate for the developmental range of the students.
- Make suggestions for teachers' professional growth activities based on data collected in cooperation with classroom teachers.
- Participating actively in the school's Budget Committee.

**Staff Management**

- Hire and retain a motivated team of teachers and staff
- Foster an inclusive and trusting environment in which staff can grow and improve
- Support and mentor staff through an effective coaching and evaluation process

- Ensure staff have access to Montessori and other professional growth opportunities

**Financial and Operational Management**

- Oversee the budget and manage expenses
- Prepare and analyze financial reports along with the Business Manager
- Oversee school operations including facilities, equipment, security and maintenance
- Ensure compliance with all governmental laws and regulatory requirements

**Stakeholder Management**

- Cultivate effective relationships with external stakeholders at the district, county and state levels
- Communicate with the Board of Directors on policies, programs, budget and other matters
- Communicate with current families to keep them informed and to ensure student satisfaction
- Cultivate relationships with prospective families through an effective admissions process
- Support staff when needed with communication with parents
- Work to maintain a positive and healthy social and emotional school climate

**Strategic Planning and Leadership**

- Work with Board to create and implement a strategic plan for the future direction of the school
- Plan, identify and secure funding resources to help the school achieve its mission and objectives
- Maintain and increase the school's visibility through effective marketing and outreach
- Assess and mitigate risks related to legislative and policy issues that may affect the school
- Problem-solve and manage unexpected changes; communicate effectively to the community

**Director of Multi-Tiered System of Support (MTSS)**

The role of the Director of MTSS is to support the Mission of the school while maintaining a focus on how it is carried out in the areas of special education and intervention. Duties include, but are not limited to:

- Coordinates the development and implementation of special programs, evaluates education plans, and confers with director, teachers and resource staff.
- Assists in the formulation of district policy and procedures for special education/ special programs necessitated by state and federal laws *and* Title V guidelines as they relate to individuals with exceptional needs. Orients general and special education program staff regarding these policies and procedures.
- Submits reports and recommendations to the administration on policy, curriculum, and legally required data. Responsible for maintaining compliance of district special programs with state and federal laws.
- Assists the School Director and Business Manager in planning budget requirements for special education/ special programs and the approval of appropriate expenditures.
- Assists in the ongoing development and evaluation of the special curriculum and ensures access to core curriculum materials for special program teachers at the school site. Coordinates curricular resources and makes them available to staff.
- Develops, implements, and evaluates in-service training programs for certificated and classified staff, both general and special education. Coach teachers where/when appropriate and offer trainings dealing on working with students with special needs.
- Assists special education personnel in developing instructional objectives and techniques for implementing IEPs for individuals with exceptional needs.

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- Provide support to teachers and administration before, during, and after the SBIT process by collecting data, suggesting supports and accommodations. Assist in the analysis of intervention data; provide support to intervention lead teacher when needed (including working with small groups of students and or one on one).
- Assist teachers in the development of Behavior Intervention Plans for students with behavior challenges. Observe focus students in their classroom setting and provide feedback to teachers on appropriate accommodations and offer suggestions for support.
- Assists in the delivery of support services to individuals with exceptional needs and following up with teachers to ensure that action plans are successfully implemented in the classroom.
- Monitors the special education services of identified students who are included in the general education classroom and consults with assigned case managers.
- Assists parents in participating in the special education/ special programs process including but not limited to identification of child's needs, IEP development and resolution of disputes.
- Participates as the LEA administrator of the Individualized Education Program (IEP) team in the identification of individuals with exceptional needs, as appropriate.
- Assists the School Director with the implementation of student placements, possibly including programs operated by districts, the county office of education, non-public school placements, state schools, etc. Seek out opportunities, services, etc. for qualifying students.
- Monitors special education/ intervention caseloads and class sizes.
- Plans and coordinates observations for visitors of intervention/special education programs.
- Assists as liaison to SELPA, community agencies, state and county schools and services, California Department of Education/Special Education Division and parent and professional groups in interpretation of special programs.
- Participates in due process hearings, complaint and compliance investigations and district self-review of compliance.
- Makes presentations to professional organizations and groups as requested.
- Assists in the development of low incidence requests.
- Provides reports to Sherwood Montessori's Board of Education on MTSS functioning
- Performs other duties as assigned.

**Administrative Assistant**

The administrative assistant performs basic secretarial duties for the school and takes care of administrative details:

- Compile and file students' grade and attendance reports, immunization and other school records.
- Greet visitors to the school, determine the nature of business, and direct visitors to destination.
- Answer telephone to provide information, take messages, or transfer calls.
- Schedule appointments to talk with the Director or teachers and handle school communication.
- Inventory, order and dispense school supplies.
- Accept and deposit funds for student activities.
- Disburse funds, record financial transactions, and audit and balance student organizations and other school-fund accounts.
- Maintain calendar of school events.
- Oversee student playground activities and monitor classroom during temporary absence of teacher.
- Assist the Director in all areas and update Director on school activities and information on a day-to-day basis.

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- Use appropriate software and hardware such as, but not limited to, fax and copier machines, word processing, school database, and spreadsheet.
- Track employee absences and record changes in sick leave available for certificated staff.
- Assist Director with duties associated with promoting the school and retaining enrolled students.

**Office Manager**

The Office Managers job duties include, but are not limited to:

- In a professional and helpful manner, greet public, answer phones, and take messages as needed.
- Adhere to confidentiality with all communications.
- Maintain student records (immunization, health).
- Maintain school attendance records for all students using attendance software.
- Manage office interruptions, including helping students in a nurturing manner and fulfilling staff's requests.
- Manage the School Lunch Program, including maintaining paperwork for the Free and Reduced Lunch Program and communicating with the contracted lunch provider to ensure compliance with all federal, state, and local legal requirements.
- Perform a variety of clerical duties, including typing, proofreading, filing, checking records and recording information on records.
- Compile and prepare various departmental files, records and reports; search files for specified information.
- Respond to routine correspondence.
- Maintain accurate attendance records, including issuing tardy slips, verifying student absences, providing information to parents, teachers and counselors; input absences into computer; contact parents/guardians by telephone or in person regarding student absences; maintain and compile truancy reports in compliance with SARB.
- Maintain correspondence with District lunch personnel regarding the number of students receiving school lunch.
- Receive and sort incoming mail, packages and faxes.
- Take care of sick and injured students; administer basic first aid and dispense prescribed medication to individual students in accordance with District and school policy.
- Receive, sort, duplicate and distribute various instructional materials; prepare materials for student packets and other related materials for distribution.
- Record all monies received on weekly deposit slips and provide receipts to payees.
- Perform other tasks as requested.

**Student Support Specialist**

The Student Support Specialist's job duties include, but are not limited to:

- Complete California Department of Education required data submissions, such as CALPADS and attendance reports.
- Cover duties of Office Manager or Administrative Assistant when either are absent.
- Maintains student records in the SEIS system.
- Fulfill role of Technology Coordinator for CAASPP and ELPAC.

- Mine data from the California Department of Education and CAASSAP for reports on student progress and school performance.
- Check employee time sheets and has them ready for the director's review.
- Assist teachers with technological and software issues, questions and training.
- Keep equipment functioning and maintain the school network including maintaining the Securly web filtering program.
- Maintain staff and student email addresses and passwords.
- Set up new students with accounts in iReady and other technology-based applications and make requested changes to student class placement in accounts.
- Maintain the school key inventory and make sure each staff member that needs a key is provided one.
- Make small repairs to the school facilities. Inform the Director when the repair needs to be performed by the District.
- Assist teachers with moving furniture and hanging or fastening items to walls.
- Perform other tasks as requested.

**Business Manager**

The Business Manager is charged with general bookkeeping for the school and will serve in an advisory role as regards the budget to the School Director and Treasurer of the Board of Directors. Specific duties include:

- Bimonthly: Verify invoices, reimbursement requests, and deposits for accuracy (amount, SACS code, funding class); print checks.
- Monthly: Create payroll; monthly profit/loss statements and cash flow analysis; oversee STRS and PERS contributions as well as Federal and State tax liabilities.
- Annual: Year-end reports as regards STRS/PERS, payroll, and tax liabilities.
- Reports: Prepare Annual Projected Budget, First and Second Interim Reports, and End of Year Expenses for Chico Unified School District; yearly accrual entries and balance restricted and unrestricted funds.
- In addition, the Business Manager may be called up to provide financial reports for grants and other requests from the CUSD, Butte County Office of Education, or California Department of Education as needed.

**Education Specialist**

- Embrace the spirit of the Montessori philosophy, which holds children in highest esteem
- Openness to the Nurtured Heart Approach and a positive discipline style
- Plan, organize and implement daily lessons in accordance with the approved curriculum
- Conduct pre and post-testing using standardized tests for each student
- As a part of a team, write and implement goals as outlined in each student's IEP
- Write Behavior Improvement Plans
- Demonstrate competency in all subject areas
- Participate in the identification of students with possible disabilities post intervention phase
- Provide academic assessments
- Schedule and chair IEP meetings
- Meet special education timeline requirements as specified by education code
- Collaborate with general education teachers
- Participate in authorized school trainings
- Maintain documentation of communications with students, families, and other services providers
- Maintain documentation of daily activities

- Complete reports as required
- Perform other duties and responsibilities as assigned.

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**Classroom Teacher**

The job duties of the classroom teacher include, but are not limited to:

- Report directly to the Director in all pertinent matters or areas of concern.
- Hold a Bachelor of Arts or Bachelor of Science degree or higher, hold a California State Teacher's Credential or commit to obtaining one within two years of employment, and hold a Montessori Certificate or commit to obtaining one within two years of employment.
- Prepare and maintain an environment that meets the needs of all learners and is reflective of the Montessori philosophy of order and beauty.
- Initiate and facilitate ongoing dialogue with parents on the overall development of each child/teen.
- Demonstrate competency to deliver an educational program based on individual needs of each child/teen.
- Demonstrate competency to provide effective, innovative instruction with a balance of Montessori materials and best practices to address adopted State Standards.
- Oversee the learning of all children/teens in the classroom while partnering with colleagues and Director in supporting the needs of all learners.
- Be a reflective practitioner open to continuous self-improvement and self-evaluation.
- Demonstrate basic computer literacy/competency, use technology to access and respond to professional emails from Director and parents, and teach technology skills as outlined in California State Standards.
- Model positive attitude and courteous behavior for children, teens and adults, and prepare all other visitors and teachers to model the same respect when working and volunteering in the school.
- Conduct the class: plan, develop, record and implement class curriculum; make materials when needed, maintain classroom materials and keep shelves clean and orderly.
- Communicate ground rules and procedures effectively to all children/teens and remain consistent with consequences.
- Communicate verbally with parents in the fall and in the spring at conferences regarding progress of students,
- Turn in comprehensive report cards for each child/teen twice yearly.
- Keep accurate and daily attendance and tardiness records for each child/teen.
- Turn in a material replacement list order, room repair list, inventory worksheet, wants/needs order, and any other documents communicated on the last Friday at the end of each year.
- Electronically submit to Director reports for the Board of Directors.
- Complete paperwork for English language learners by due dates.
- Complete Report Cards on standard forms by due dates.
- Collect and turn in data on student achievement as requested by Director or Director of MTSS.
  Act as immediate supervisor of instructional aides assigned to classroom, including: assigning tasks as needed, providing formative feedback and a formal evaluation, and providing appropriate training or referral to appropriate training as needed to optimally perform duties.

**Instructional Aide**

- Demonstrate flexibility in assisting classroom teacher in myriad and changing ways that will maximize benefits to the learning community.
- Model positive attitude and courteous behavior for children, teens and adults, and prepare all other visitors and teachers to model the same respect when working and volunteering in the school.
- Assist the classroom teacher in preparing and maintaining an environment that meets the needs of all learners and is reflective of the Montessori philosophy of order and beauty.
- Communicate ground rules and procedures effectively to all children/teens and remain consistent with consequences.
- Maintain vigilance in supervising students for safety in classrooms and recreation spaces.
- Demonstrate openness to obtaining new skills that will optimize effectiveness in assisting classroom teacher to meet the needs of all students.
- Demonstrate competency in behavior management using cooperative/positive discipline techniques in whole class, small group, and 1:1 settings.
- Demonstrate ability to use computers, copiers, and other office equipment needed to assist classroom teacher in work related duties.
- Implement program developed for exceptional students as communicated by Director of MTSS and classroom teacher.

**Paraprofessional Aide**

- Support the success of exceptional children in all educational settings of the school, such as the Learning Center, the general education classroom, the playground, etc.
- Work with the Educational Specialist and classroom teacher to implement Behavior Improvement Plans or other supports that assist assigned student/s in the least restrictive environment (i.e.: always seeking to provide minimal interference to independence for the student/s).
- Use professional communication to seek clarification of desired role in different settings or from different supervisors.
- Demonstrate flexibility in assisting classroom teacher in myriad and changing ways that will maximize benefits to the learning community.
- Model positive attitude and courteous behavior for children, teens and adults, and prepare all other visitors and teachers to model the same respect when working and volunteering in the school.
- Assist the classroom teacher in preparing and maintaining an environment that meets the needs of all learners and is reflective of the Montessori philosophy of order and beauty.
- Communicate ground rules and procedures effectively to all children/teens and remain consistent with consequences.
- Maintain vigilance in supervising students for safety in classrooms and recreation spaces.
- Demonstrate openness to obtaining new skills that will optimize effectiveness in assisting classroom teacher to meet the needs of all students.
- Demonstrate competency in behavior management using cooperative/positive discipline techniques in whole class, small group, and 1:1 settings.
- Demonstrate ability to use computers, copiers, and other office equipment needed to assist classroom teacher in work related duties.
- Implement program developed for exceptional students as communicated by Director of MTSS and classroom teacher.

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**Tutor-Childcare**

Examples of duties may include, but is not limited to the following:

- Assist tutoring of students in academic subjects, such as math, reading, writing, and other areas.
- Assist planning and implementation of academic, enrichment, health, and recreational extra-curricular before and after school.
- Help students in academic subjects, such as reading, writing, math, and other areas.
- Work effectively with students in extended learning activities and assist with behavior management, discipline, interpersonal actions, and act as a role model.
- Help mentor students in a variety of learning and life experiences.
- Support environments that are safe, healthy, and conducive to student learning.
- Gather and maintain student participation, development, and achievement data for program evaluation efforts.
- Participate in staff training and professional development opportunities.
- Perform related duties as assigned by supervisor or classroom teacher.

## Professional Conduct

Sherwood Montessori strives to be an exemplar in educating for the human potential. We value candid, respectful communication with openness for hearing the needs of others. We honor others' perspectives and positions and actively seek to understand these within the context of a diverse society. We are committed to ownership of one's education, for students as well as the lifelong learners who comprise our staff. Sherwood seeks to be a community where talent, ideas, input, and knowledge are actively shared, sought out, honored, and acted upon. We acknowledge that conflict is a natural product of the complexity of the human condition and commit to approaching conflict with a problem-solving agenda, receptivity to feedback, and an appreciation of lessons learned. Sherwood staff members should conduct themselves in a manner that reflects an understanding of the school's mission statement and core values.

All employees are expected to treat students, staff, and parents with respect at all times. If a teacher feels that a parent or another staff member has behaved inappropriately, this matter should be brought to the School Director's attention promptly.

## Facilities Use Agreement with Chapman Elementary

Sherwood Montessori has facilities on Chapman Elementary campus, property owned by the Chico Unified School District (CUSD), and 1010 Cleveland Ave., property owned by Sherwood Montessori. We are committed to being good neighbors to Chapman Elementary, and to adhere to the guidelines and schedules outlined in the Facilities Use Agreement (FUA). Sherwood employees are expected to follow the schedule and agreements outlined in the FUA. The Director is the point of communication between Chapman/CUSD for any issues regarding the facility located on CUSD property, including: needed repairs, desired improvements or changes, and the lunch/recess/P.E. schedules and boundaries. Employees of Sherwood should communicate with the Sherwood Director to address all concerns related to the facility and are not to contact staff of CUSD.

## Confidentiality

Employees of Sherwood Montessori are obligated to maintain confidentiality of all information relating to students, families, and employees. Personnel and student records will remain in office files with access restricted to those under the umbrella of confidentiality. Two-way release of confidential information consent forms must be signed by involved parties before information can be released to extended parties. Exceptional care must be taken to protect confidential information; failure to abide by this procedure may lead to termination. This requires that private information not be discussed with parents of other children, and that confidential information be safeguarded, including staff memos, correspondence, and student records.

Employees are required to safeguard student and family confidentiality in:

*The Environment*

- When discussing sensitive information with students (home life, academic needs, IEP and 504 goals or services) make sure you are in an area where other students or parents cannot hear.
- When you are reading email, be sure no one else can see your screen and sign out of your account when finished.
- Do not post in areas that can be seen by other students or parents the names of kids in intervention groups or schedules that indicate on them that the students are in groups for counseling, intervention, speech, or other IEP services. This includes in the Learning Center.
- Do not post contact information in the classroom. We do not have permission from all families to publish this information.

*Email*

- Do not share contact information unless you have been given written permission by every parent in your class to do so. Use bcc for sending email to the whole class or groups in the class.
- Do not share information about disciplinary issues that involve other students in email. Use “a student” or “students”. While the parent is likely to hear from their child who else was involved, it can’t be us who lets them know.
- When communicating about counseling groups, use bcc to preserve students’ confidentiality if you are trying to put together a group. Once they are part of the group, it is likely that they will tell their parents who else is in the group, but we cannot share this information, even if the parent wants to know as part of the decision-making process. Many, many groups have not happened because the parents weren’t comfortable with giving consent without knowing who else would be in the group. Unfortunately, these are the constraints within which we must work.

*Documentation*

- Discipline documentation that goes home should not include any student name except the name of the child in the family receiving it. Use “a student” or “students” to refer to other students involved. While the parent is likely to hear from their child who else was involved, we are not to be the source of this information.
- Do not post or leave documents out where parents or other children can see them if they contain discipline information, IEP or 504 information, contact information, or any information that could be considered sensitive.

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*Face to Face Communication*

- Do not share discipline information, IEP or 504 information, contact information, or any information that could be considered sensitive in a conversation if there are others around that can hear you, even if you think the "others" won't know who you are talking about.
- Be careful in the community with the above point. The person behind you in line or in the next booth at a restaurant might know who you are talking about, Chico is a small town.
- Even positive information is confidential. An employee was once complimenting a family member on good marks on a report card and a formal complaint was made by the parent.
- Be mindful of when you need to "Neither confirm nor deny!" a remark made by someone not under the umbrella of confidentiality. For example, if a parent says something like; "Sally just ran that way with her aide, well, I assume it is her aide…" do not confirm the guess. This can be tricky, e.g.: you are organizing a field trip and need to make sure there is room for an instructional aide to ride with a particular student. You would say to the driver: "Will there be space for another adult to ride in the front passenger seat? I would like Rachelle to ride with this group." Rather than "Can Rachelle ride in your car? I need her with Kevin."

## Communication Protocol

In our small community, we often find ourselves in multiple roles. Many of our employees are also parents and communicating from these overlapping roles can be challenging. The following guidelines were developed with input from employees who have multiple roles.

***Parent Role***

- If you are a parent at this school who is also an employee, it is important to remember to be an employee during work hours and a parent when off the clock. That doesn't mean you can't give your kids a hug or smile throughout the day, but please be mindful of limiting these interactions to not distract your child's classroom or your child as a student.
- As a parent/employee you may have access to observing parts of your child's day other parents do not have. Please be aware that teachers and staff should not be put in the position where they feel you are judging their work. If you do observe something that troubles you, DO NOT approach your colleagues during the work day. You must follow communication protocol any other parent would follow: respect teachers' time, DO NOT approach them "on the fly", in the hallway or during their lunch or other break times. Send an email or make an appointment for a meeting. Be mindful of how much time you are taking. Most parents are limited to two conferences a year, are you taking too much?
- Be honest with yourself regarding your ability to remain neutral when your child conflicts with other students or with her or his teacher. Discuss difficulties you are having with your immediate supervisor.

***Employee Role***

- Please be aware of ways you might be communicating differently with colleagues who are also parents. Even positive feedback about one's child can be disruptive to a colleague's day if s/he is not expecting it because s/he is at work, in an employee role. If you have feedback, positive or constructive, for a colleague about her or his child, ask yourself: How would I handle this with any child who did not have a parent working at this school? *If you are a teacher's aide or paraprofessional aide note that the Employee Handbook restricts you from directly communicating with parents as this is the teacher's role, not the role of an aide.*
- Part of a teacher's role, or a director's role, is to communicate information about students to their parents. If the parent is also an employee here, you may be tempted to communicate with that parent when they are at Sherwood during their work day as an employee. DO NOT approach your colleagues during the work day. You must follow communication protocol as a teacher or director with these

parents in the same way you would for any other parent. DO NOT approach them on the fly, in the "hallway" or during their lunch or other break times. Send an email or make an appointment for a meeting.

- If you find that you are having trouble working with a colleague's child in a natural and uninhibited way, please discuss this with your immediate supervisor.
- If you have feedback that you feel is important for parents to know, but you are not a Lead Teacher, please consult with your immediate supervisor about an appropriate way to get the feedback to the parent.

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***Supervisor Role***

- If you have a role as a supervisor (director or teacher), it is important to be aware of how your authority can affect others If you are feeling emotionally charged because of something to do with your child, reset yourself. It is o.k. to have strong feelings and it is o.k. to express yourself, but you must do so in a professional manner when you are in your professional role.

More guidance regarding communication including use of school email, website, social media, meetings, the request system, weekly school announcements, texting, and many other forms of communication can be found in the *Operational Plan*.

## Certification and Credentials

Classroom Teachers, Instructional Aides (IAs) and Specialty Teachers will be required to maintain a current Live Scan through the Department of Justice prior to and during the entire period of employment at Sherwood Montessori, current Child First Aid/CPR certification and TB testing.

Classroom Teachers

Sherwood Montessori teachers are required to have a minimum of a bachelor's degree from an accredited, degree-granting institution and a valid authorization from the California Commission on Teacher Credentialing (CCTC). Head classroom teachers must demonstrate core academic subject matter competence, in the elementary grades through passing CCTC's approved subject matter examination or by completing the California High Objective Uniform State Standard of Education (HOUSSE). Head classroom teachers that demonstrate core academic subject matter competence may teach with an Intern Credential for up to two years as they actively work to obtain a California Teacher Credential (Multiple Subjects). Teachers of English Language Learners (ELLs) are also required to demonstrate competency in teaching ELLs. This may be fulfilled with a CLAD or BCLAD credential or by passing a CCTC approved exam.

Middle School teachers will also be expected to teach multiple subjects and ELLs and will be held to the same requirements.

Montessori training and experience will be highly valued and sought by Sherwood Montessori. Teachers who do not yet hold a Montessori Teaching Certificate from an accredited training site will be considered if able to demonstrate teaching congruent with the Montessori approach to education. Such an individual would be expected to seek out professional development opportunities that would enhance the authenticity of this approach.

Teachers of students with special education needs will be required to have appropriate special education credentials and/or licenses.

Instructional Aides

IAs must hold a high school diploma and must have completed a minimum of two years of post-secondary study (defined as 48 semester units or greater) or hold a minimum of an associate degree. The coursework will include subjects specifically designed to prepare the candidate for demonstration of working knowledge of and the ability to assist in instructing reading, writing, math, or additional subjects as declared by the Sherwood Montessori Board of Directors.

IAs will have any additional qualifications that meet the requirement of relevant federal and state regulations associated with funding received by the school.

Specialty Teachers

These positions may be filled by non-certified teachers as allowed by law.
Minimum qualifications for Specialty Teacher positions are:

• If the subject is deemed academic by the school Director (e.g., Reading/Language Arts, Science, History, etc.), the candidate shall hold a minimum bachelor's degree from an accredited institution and prior teaching experience of elementary-aged children. The preferred candidate should also have Montessori training in his/her subject area.

• For Visual and Performing Arts, the candidate should possess an established history of excellence in both the medium and in teaching.

## Criminal Background Check

All employees and contracted individuals that work with children/teens will have a criminal background check conducted upon their initial employment. No condition or activity will be permitted that may compromise the School's commitment to the safety and the well-being of students. Conditions that preclude working at the School include conviction of a controlled substance or sex offense, or a serious or violent felony. Additionally, should an employee, during his/her employment with the School, be convicted of a controlled substance or sex offense, or serious or violent felony, the employee must immediately report such a conviction to the School Director.

## Child Abuse & Neglect Reporting Procedures

All employees and volunteers at Sherwood are mandated reporters and have a legal duty to report and suspected child abuse or neglect. Any employee who knows or reasonably suspects a child has been the victim of child abuse shall report the instance to a child protective agency. Child abuse is broadly defined as "a physical injury that is inflicted by other than accidental means on a child by another person." School employees are required to report instances of child abuse when the employee has a "reasonable suspicion" that child abuse has occurred. Reasonable suspicion arises when the facts surrounding the incident or suspicion could cause another person in the same situation to suspect child abuse.

Child abuse should be reported immediately by phone to a child protective agency. The Chico Children's Services 24 hr. hotline number for the Chico area is:1-800-268-8822 Oroville area: 1-800-400-0902. The phone call is to be followed by a written report within thirty-six (36) hours that must be faxed to the child protective agency.

While there is no legal duty for the reporter to contact the child's parents, reporters are strongly urged to do so if a productive dialogue could be expected to maintain the relationship between the family and the school and to offer support to families in crisis. If the reporter suspects that the parent might retaliate against the child or attempt to cover up evidence, no communication to the parents should be made. If a child is released to a peace officer or a child protective agency agent, the reporter shall not notify the parent as required in other instances of removal. Following the report to the proper authorities, employees must notify the School Director regarding any incidents of known or reasonably suspected child abuse.

## CPR & First Aid Training

Sherwood employees will be trained in CPR/First Aid training for infants, children and adults. Sherwood will adhere to the same requirements put forth by the California Commission on Teacher Credentialing for acceptable training programs. Red Cross training programs for infants, children and adults provide appropriate programs.

Sherwood offers training in First Aid/CPR every other year. Employees are required to attend or seek out comparable training to be certified, but the cost will not be covered by the school for these alternate trainings. It is especially important for after care staff, office staff, and employees assigned to First Aid in the event of a disaster (see Comprehensive School Safety Plan) to have current training. If your training has lapsed, please see your immediate supervisor for guidance regarding steps to take to be in compliance with this safety policy. The safety policy requires that a CPR/First Aid trained employee be on duty whenever there are children on campus.

If a student is injured at school and the injury will require follow up care at home, an Injury Report (see Appendices) will be sent home to inform parents. If an injury will require follow-up care at home, including washing the wound and changing bandages, an Injury Report (see Appendices) must be filled out, copied, and sent home. The copy should be placed in the Director's mailbox. Minor bruises, scratches, and scrapes do not need an Injury Report. The employee who was on supervision duty at the time of the injury should complete the report.

When administering first aid, it is crucial that universal precautions are taken to prevent transmission of blood borne pathogens (see Comprehensive School Safety Plan). Blood borne pathogens training is an annual training required by all employees. In this training, proper use of latex gloves and proper clean up after a body fluids spill is explained. All staff are required to use gloves when assisting injured children or adults, and these should be available in all classrooms and the office. In addition, each classroom and the office should have a well-stocked first aid kit.

School employees are not allowed to administer any medication to a student for any reason without an "Authorization to Administer Medication" form on file for the student. This includes homeopathic and alternative medicines. School employees may not administer cough syrup, aspirin, ibuprofen, or any over the counter medication at school without an authorization on file with a physician's signature. Students who are old enough to self-administer such medication are allowed to do so, but we ask students to keep the medicine in the office to prevent other students' access.

Whenever a child has a head injury, an exam to determine the extent of the injury should be conducted. If the student sustains a head injury while on campus, however minor, the student should be sent to the office for a second look. First aid training requires that the child is checked for coherence, dizziness, and nausea: ask the student their name, age, where they are, what happened. Pupils should be checked for symmetry and appropriate response to light. The surface of the head should be examined for blood or bumps. A Head Injury

Report (see Appendices) must be filled out and sent home to notify parents so they can continue to monitor for potential concussion.

Serious injuries should be followed up with a phone call home to parents from a Sherwood staff member. If you have witnessed an injury, please be sure to ascertain who will be making the phone call.
For serious injuries that require immediate medical intervention, call 911 and see that the injured child is transported to the emergency room for treatment. If it is necessary to transport a child via ambulance, an employee of the school should ride with the child in the ambulance if the parent is not available.

## Data Collection

The reading, writing, and math assessments used at Sherwood have changed over time. We are currently collecting Interim Assessment Block data for ELA and math for grades 3-8 and Fountas and Pinnell guided reading levels for all grade levels (once kids begin reading). In addition, teachers collect writing assessment data from student samples written to a prompt and kindergarten students are assessed using a teacher created assessment tool based on kindergarten standards. It is important that teachers follow deadlines and turn in assessment data in a timely manner so there is no delay to the implementation of interventions when needed. Substitute teachers may be assigned, one day per collection period, if teachers are having difficulty collecting data while conducting class.

In addition to these formative data collections, we give state assessments for English learners (formerly CELDT, currently ELPAC) and the required state summative assessments for students in grades 3-8 (CAASPP and CAST).

Finally, for students who are at tiers two & three of our MTSS, teachers (both intervention teachers and classroom teachers) must bring assessment artifacts to periodic SST or IEP meetings.

Teachers who wish to have a child considered for intervention services must first implement modifications and supports in the classroom with fidelity for a period of six to eight weeks and collect data on these tier one interventions No student will be considered for intervention services without documented data to support the need.

Teachers should bring the students' achievement goals to every IEP/SST meeting and data collected from the tier one supports in place. Best practice: consult with IEP/SST team ahead of time to determine what data to bring.

Examples:

- Running records from instructional and/or independent text levels.
- Results of BPST (Shefelbine), Developmental Spelling Inventory (Pearson/Words Their Way),
- Color, level or stage in any sequenced literacy material you use (bring a sample to share!)
- Data collected from behavior charts/goals, documentation of behavior issues (Incident Report, anecdotal notes, alternate collection forms)
- Formative assessment data: iReady results, teacher-chosen or created math assessments, spelling tests, guided reading comprehension checks/follow up work
- Student work samples/portfolio pieces
- Copies of CAASPP assessment results, CELDT assessment results, teacher created/chosen summative assessments

- Current Interim Assessment Block -data

## Decision Making Process

Sherwood Montessori success is a collaborative effort between teachers, administration, support staff, parents and the Board. The following is a list of items that require BOTH teacher input and FINAL APPROVAL from Director:

1. Class placement/class lists
2. Enrollment/admissions
3. Whether or not a student will have support services/an IEP/SST
4. Strategies that will be implemented with 504s and IEPs
5. Safety procedures
6. Whether or not a student will be promoted to the next grade level
7. Instructional Aides' assignments
8. Staffing assignments
9. Instructional Aide's schedules
10. Enrichment schedules (art, music, PE)
11. Whole school events
12. Fundraising
13. Field trips: overnight/out of state requires Board approval
14. Employee performance issues
15. Aide evaluations

## Guidance and Discipline

All Sherwood personnel need to familiarize themselves with the *Family Handbook*, paying close attention to the section titled "Guidance and Discipline" for issues dealing with student behavior. Staff members who are not able to use a positive approach to discipline will not retain employment at Sherwood. Please see the appendices for samples of a "Thought Paper" and an "Sherwood Referral Form". These are available for staff members to use in consult with a Classroom Teacher to facilitate communication with families regarding student behavior.

During the 2017-2018 school year, a team from Sherwood began Positive Behavior Interventions and Support (PBIS) training, a three-year training that culminates in school-wide implementation of clear school rules, expectations, and strategies to support students in meeting expectations and following rules. The 2018-2019 school year was the first year of implementation with Tier 1 (program for all students) rolling out on the first day of school. Evidence of the program will be visible to all students, teachers, parents, staff and visitors as expectations will be posted around campus. A *PBIS Handbook* will be made available to all Sherwood community members. Continued refinement of the PBIS strategies, expectations and responses will be an ongoing effort with the PBIS school team taking lead. All teachers and staff are expected to adhere to the guidelines in the school *PBIS Handbook*.

During recess, playground supervisors are expected to remain in their assigned areas and to be actively monitoring the children's activity. It is unacceptable for playground supervisors to be socializing with one another or using cell phones for any reason during recess.

***When the bell rings to signal the end of recess is a primary time for behaviors to happen.*** When the bell rings, noon duty supervisors are to show body language that conveys, from across a playing field, active supervision

of interactions (body oriented towards students walking in, shading one's eyes). Playground supervisors who are walking in class lines should stand by the line, but scan the students who are walking in. This would not be a time to become absorbed in a 1:1 conversation with a student. If a student requests attention, the supervisor should tell the student that he/she are listening but needs to keep eyes on the group. The staff member should make it obvious that this is what he/she is doing.

## TB Testing

No person shall be employed by the School unless the employee has submitted proof of an examination within the last four (4) years that the employee is free of active tuberculosis. This examination shall consist of an X-ray of the lungs or an approved tuberculin test which, if positive, shall be followed by an X-ray of the lungs. Thereafter all employees shall be required to undergo the foregoing examination at least once every four (4) years or be examined by our licensed school nurse. After such examination, each employee shall cause to be on file a certificate with the School from the examining health care professional showing the employee was examined and found free from active tuberculosis.

## COVID-19 Related Workplace Mandates

Health guidance and related workplace mandates have been in place and evolving since March, 2020 when a state of emergency was declared and school campuses closed. Because the situation has been so fluid, the current guidance and mandates will be communicated via memoranda from the school director. School employees are expected to adhere to the communicated guidelines and mandates. If an employee feels they are unable to adhere to the direction from the memoranda because of a medical condition, the employee may seek an appointment with the school director to discuss potential reasonable accommodations.

## Performance Evaluation

Employees of Sherwood Montessori will be expected to engage in reflective practice: an ongoing, informal evaluation of one's own performance as an educator. As well, formal performance evaluations for classified staff will be conducted at least once a year. Certificated staff have formal evaluations by the School Director their first two years, followed by a year off (Director will still conduct informal evaluations and walk-throughs of the classroom in off years), followed by two years of peer evaluations. The cycle then repeats. The frequency of performance evaluations may vary depending upon length of service, job position, past performance, changes in job duties, or recurring performance problems.

Prior to any evaluation, an evaluation form will be distributed to teachers or immediate supervisors for input on his/her performance and areas for improvement. Additionally, a formal observation will be completed. Classroom teachers will meet with the Director to discuss the Director's documentation of evaluation and discuss performance and a plan for professional growth.

Performance evaluations will review standards such as but not limited to: the quality and quantity of work performed, knowledge of the job, initiative, communication skills, work ethic, and collaboration. The performance evaluations are intended to make the employee aware of progress, areas for improvement, and objectives or goals for future work performance.

Instructional Aides will be evaluated by the teacher they assist with the Director overseeing the process. IAs will be evaluated on punctuality and attendance, effectiveness and responsiveness with students, initiative, and communication skills.

Unfavorable evaluations and lack of progress on meeting goals and objectives may affect renewal of contract or serve as grounds for termination. Favorable performance evaluations do not guarantee increases in salary or promotions. Salary increases and promotions are solely within the discretion of the School. After the evaluation, the employee will be required to sign the evaluation form to acknowledge that it has been presented, reviewed and discussed. Employees may write a response to the evaluation to be filed as an appendix of the evaluation to expand on any content or to submit a rebuttal in the event there is a discrepancy between the perspective of the evaluator and the employee.

## Personnel Files

All staff should notify the Director immediately of any changes address, telephone number, number of dependents and person(s) to notify in case of emergency.
The School will restrict disclosure of your personnel file to authorized individuals within the School. However, the School will cooperate with requests from authorized law enforcement or local, state or federal agencies conducting official investigations or as otherwise legally required.

## Security & Emergency Protocols

All Sherwood personnel should be familiar with the Comprehensive School Safety Plan. Any duty described therein that is not something a staff member is comfortable or familiar with should be discussed with the Director.

Be aware of unknown persons loitering on campus. Report any suspicious persons or activities to the office promptly. If any adult who is not a staff member, including parents, delivery persons or repair persons, comes to your classroom during the school day they should have a volunteer badge or a visitor badge visible. If they are not displaying one of these badges, please ask that they report to the office for this badge.

Classroom teachers will secure windows and lock classrooms or work areas at the end of the day or when away from the classroom for an extended period. The security of facilities as well as the welfare of our employees and students depends upon the alertness and sensitivity of every individual to potential security risks. You should promptly notify the Director when keys are missing. Pedestrian gates on the perimeter fencing are locked after school starts in the morning and after dismissal, by 3:10 p.m. at the latest.

- The pedestrian gate from the CARD parking lot will be open during the week.

- On the weekend, there are two campus gates left unlocked (the pedestrian gate to the CARD parking lot is locked over weekends and vacations). The two unlocked-on-the-weekend gates are pedestrian gates with cameras pointing at them: one is the last one on Chapman campus near the TK/kindergarten classrooms, and the other is near the cafeteria.

These two gates are left unlocked over the weekend so community members can access the playground, and all who enter will be recorded on the cameras. Teachers will be aware of where their students are at all times. There should not be children on the backside of any building unattended. Children may work outside as an extension of the classroom; however, they must remain visible to a teacher or IA.

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~~During recess, playground supervisors are expected to remain in their assigned areas and to be actively monitoring the children's activity. It is unacceptable for playground supervisors to be socializing with one another or using cell phones for any reason during recess.~~

~~***When the bell rings to signal the end of recess is a primary time for behaviors to happen.*** When the bell rings, noon duty supervisors are to show body language that conveys, from across a playing field, active supervision of interactions (body oriented towards students walking in, shading one's eyes). Playground supervisors who are walking in class lines should stand by the line, but scan the students who are walking in. This would not be a time to become absorbed in a 1:1 conversation with a student. If a student requests attention, the supervisor should tell the student that he/she are listening but needs to keep eyes on the group. The staff member should make it obvious that this is what he/she is doing.~~

The two-way radios are meant to be used for EMERGENCY ONLY. Disruptions during the work period can cause teachers to turn the volume down, which is dangerous when an actual emergency occurs. The two-ways are not to be used to communicate about students coming and going, or to communicate staffing issues, or to request for help in non-emergency situations. If you have to wonder if the situation is an emergency, it is not. This is a serious safety issue and disciplinary action will result if the two-way radios are used for situations that are not emergencies. *The only exception to this is during lunch/recess and before/after school, when it will not be interrupting the learning in the classrooms.*

## Use of Email, Voicemail, and Internet Access

Sherwood will permit employees to use its electronic mail, voicemail systems and Internet access subject to the following:
Minimal personal use as long as it does not interfere with timely job performance and is consistent with law and appropriate protocols. Cell phone and email should only be used during official breaks when not supervising children.
The Email system and Internet access is not to be used in any way that may be disruptive, offensive to others, or harmful to morale. For example, sexually explicit images, ethnic slurs, racial epithets, or anything else that may be construed as harassment or disparagement of others based on their race, national origin, sex, sexual orientation, age, religious beliefs or political beliefs may not be displayed or transmitted.
Employees should not attempt to gain access to another employee's personal file of email or a voicemail message without the latter's express permission.
Only students who have on file with the school parental permission to record their image may be included in photos or video recordings. Permission forms must be obtained prior to any recording of students' images.

## Use of Media for Instruction

Many of our families limit the screens their children watch, and some do not watch screens for entertainment at all. Teachers should consider this when making choices about using screens. Please do not show entertainment media without educational purpose. If a teacher wishes to show a movie, she/he will need parent permission if it is not rated G. Teachers should also consider that research has shown that students glean little educational value from watching videos. Videos and movies should never be chosen as a primary means for instruction.

From: "The Play's the Thing: Experimentally Examining the Social and Cognitive Effects of School Field Trips to Live Theater Performances" by Jay Greene, Heidi Erickson, Angela Watson, and Molly Beck in *Educational Researcher*, May 2018 (Vol. 47, #4, p. 246-254):

> "It is educationally significant and a bit surprising that watching a movie is not a particularly effective way of conveying content knowledge while watching a play is. Watching movies is an extremely common school practice, but it may produce little learning. Going to see a play, on the other hand, is less common but appears much more effective."

Employees may not show videos from cell phones. These devices do not have our internet safety filter and harmful media could be shown to kids unintentionally. Likewise, students are not allowed to use their phones during school to view videos.

## Purchasing & Reimbursements

All approved expenses should be turned in with original receipts. Approved expenses are those expenses which have been reviewed and approved by the Director. Reimbursements should be submitted in totals of $35.00 or more. Reimbursements are made on pre-determined dates only, no exceptions. Reimbursements may take up to two weeks to process. If waiting for a reimbursement will be a burden on the employee, it is recommended that a request for purchase be made instead, to be approved by the Director, and the purchase will be made by the Administrative Assistant.

For mileage or travel:

The Director will make travel decisions for other staff members for professional development on an as needed basis, based on budget/grant amounts, etc. Director and staff member, together, will fill out the Individual Travel Agreement to outline expectations.

Checks for the school are written on the first and third weeks of the month. Requesting checks with a turnaround of less than two weeks can cost the school a considerable amount of money and may not be possible. For classroom teachers, this is usually for field trips. Please request checks from the school at least two weeks ahead of the time you need them.

***Purchasing for the school year should be wrapped up by the beginning of May in most cases***. Funds provided in class budgets are intended to be spent within the fiscal/school year for the class of that year. For this reason, our financial auditors have advised us that purchases made in the last weeks of school are obviously not going to be used by the current class and are therefore an inappropriate use of funds. Examples of acceptable uses of funds at the end of a school year include field trips or class parties, things that would be experienced by the class for whom the funds were intended. Unspent classroom funds do not roll over to the next year.

## Field Trips

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*At this time, and until health guidance changes, it is necessary to adhere to mandates requiring masking of adults, whether vaccinated or not, while in the presence of students. Current health guidance also requires children over the age of 2 wear masks indoors for all school related functions, including field trips. For these reasons, field trip driving arrangements must be single households, or public transportation, or rented vehicles driven by school employees.*

Teachers wishing to take their class on a field trip will need to fill a Field Trip Application form from the Administrative Assistant. The Administrative Assistant can create permission slips with appropriate requested fees, letters to parents regarding the trip, and other documents if needed. If a teacher wishes to take a trip that will take longer than the regular school day or will cross state lines, she or he must present a proposal to the Board of Directors for approval at least three months in advance of the field trip.

During the 2017-2018 school year, teachers compiled a list to share with one another that included top field trip destinations for each level. Teachers are asked to consult this list when planning field trips to ensure that students do not have repeat experiences over many years or miss important experiences this area offers. If a teacher wishes to take a class to a destination that is commonly visited by another grade level, first a dialogue with the teacher/s from that level should take place to determine if it is in the best educational interest of the students.

Parent volunteers acting as chaperones on field trips must submit proof of insurance prior to driving students. Chaperones are expected to actively supervise students, therefor are not permitted to bring children other than those students they are assigned to as this can create a distraction from chaperoning.

TK / K

- Gateway museum
- Air Museum
- Books family farms
- Chico State Farm
- Worm farm (Durham)
- Nature Center

Lower Elementary

- Rice Fields (save the eggs)
  -Starts in the fall (Snow Goose Festival)
- Public Library
- Movies at Pageant Theatre
- Musical at PV High School
- Friends of Butte Creek
- Salmon Tours (Sept. 25 - Oct 10)
- Chico Nature Center
- Nature Discovery
- Aquatic Investigations
- Meet the Animals
- Wetlands Discovery
- Sacramento wildlife Refuge (Dec or Jan)
- Table Mountain
- Tree Farm
- Mendocino National Forest
- Chico Seed Orchard
- Patrick Ranch (spring and fall)
- CSU Chico Anthropology Museum
- Laxson Theatre
  - Folklorico

    - JR. Musicals
    - Asian Drumming
    - Music from India
- Fishery Hatchery - April or May (fish killed in fall)
- Patricks Ranch
- Ecological Reserve – 3rd Grade
- Country Pumpkins
- Climbing wall at CSU Chico
- Bidwell Park walks
- Ron's Reptiles
- Planetarium Redding L.E.
- Monca to museum
- Valene L. Smith
  -Museum of Anthropology (every class – twice a year)
- Shasta Caverns
- Chico Creek – Nature Center
- Gateway Science Museum (2 times a year – All students)
- Bidwell Mansion
- Earthbound skills – 4 separate programs
- Tree Tour Chico State
- Chico Museum
- Fab Lab

Upper Elementary

- California State Capitol (4th and Up)
- Earthbound Skills
- Gateway Science Museum
- Janet Turner
  -Print Museum (4th and up)
- Fab Lab
- State Capital
- Marine Mammal Center
- Rancho Esquon
- Aquatic Forebay
- Trapper's Camp (4th grade)
- Mt. Lassen
- Laxson Performances
- Age of sail
- Water Works Park
- Ecological Reserve
- Landfill
- Railroad Museum
- Hands on Science Lab
- Science Camp (4th grade)
- See Salmon in Nature
- Sutter Fort
- Oroville Dam – Visitor Center
- Rice Fields (save the eggs – start in fall)

- Oroville Aquatic Forebay
- Gold Nugget Museum – Paradise
- Oroville Chine

Middle School

- Peer Mediator workshop at Marsh Jr.
- Laxson performances
- CSU Challenge Course
- Chico Science Fair Tour
- Caritas Creek Science Camp/ Shakespearean Festival in Ashland
- The Center for the Arts performances
- Book's Pumpkin Patch
- Fab Lab
- Monaca
- CSU Hands on Science Lab
- Kids & Creeks (Upper Park)
- Orient & Flume
- Butte Humane Society
- Fair Street Recycling
- Paradise Performing Arts Center

Online resource for field trip ideas: Outdoor Education for all: https://oefa.weebly.com/

## Conferences & Report Cards

Teachers will hold conferences for all students twice a year on days indicated on the school calendar. Teachers may request additional conferences as needed and the Director will be present if the teacher feels support is needed and/or appropriate. Report cards will be written by classroom teachers for each student twice per year. Copies of report cards must be filed in students' cumulative files by the last contracted day of the school year. This task is the classroom teacher's responsibility but may be delegated to a Sherwood employee who has been apprised of the confidentiality required.

## Independent Study

~~Students at Sherwood Montessori may be granted an~~Currently, California law does not support charter schools to provide Independent Study ~~if they need~~. Previously, the school was able to provide short-term independent study options for families who needed to be away from school during any calendared student day. Parents ~~are~~were able to make the request to the Director at least two weeks ahead of the scheduled trip or absence~~.~~ ~~Teachers are asked to pull together work for~~ and attendance would be counted once the student ~~for the duration of the Independent Study such that it is comparable to~~returned and the teacher was able to review the ~~quantity and quality~~work to assign value of time of work ~~the student would do if she or he were present at school. Teachers are asked to sign and fill all paperwork carefully as it will be used to recoup ADA, i.e.: public funds. When students return to school, teachers are asked to turn in all work to the front office; original work must be kept on file in the office~~completed.

~~For~~After the 2020-2021 school year, ~~while we are in distance learning, students in~~California legislature supported Independent Study ~~are required to have daily interaction with the~~options through Districts and County Offices of Education only and has a moratorium on new nonclassroom-based charter school~~. This is a~~

~~departure from previous years, however, a provision in~~ programs. If the law ~~allows for an alternative plan~~changes back to charters being able to ~~be developed with stakeholder input if daily interaction is not feasible~~provide short-term independent study options, Sherwood will provide those according to our previously adopted board policies.

## Staff Attendance

Attendance and timeliness are crucial parts of the consistency and well-being of the school and more specifically the children/teens. All staff should be on time and work according to their contract. Excessive tardiness and absences will need to be problem-solved with the Director.

### Absences

Any staff member that wishes to have a shift or day off when they would normally be scheduled to work is required to fill a *Request for Absence* form. This form is available in the Appendices of this document. Unless the form is returned to the employee with the Director's signature and approval, the absence will be considered a no-show and disciplinary action up to and including termination will follow. Exceptions may be made for emergency/illness.

Any staff member or contracted employee that will be absent on a given day will be recorded on the white board in the office used to facilitate this communication. Teachers are asked to check the board daily to see if changes will need to be made to the daily plans.

When possible, staff should contact their own substitutes from their approved substitute list. If a staff member is too ill to contact subs, s/he should notify the Director and/or Administrative Assistant who will secure a substitute for the staff member. In the case of teachers, only one substitute will be paid at the teacher substitute rate for covering the absence. It is the responsibility of the employee planning the absence to communicate clearly to the substitute what position she or he will be covering and what the rate of pay will be. When the substitute is secured by the Director, the Director shall clearly communicate this information.

The *Absence Verification* form must be completed by any staff member who is absent for any reason, whether the absence was preapproved or unexpected, within three workdays. This is to assist the Director in accurately recording absences for sick days available and to accurately assess the employee's reliability. This form is also available in the Appendices of this document.

### School Functions and Meetings

Attendance at school functions is encouraged, but not required, with the exception of Back to School Night and Open House being required for classroom teachers. If a teacher cannot attend the scheduled Back to School Night or Open House, s/he will set an alternate date for the event for the families of her or his class.

**Certificated staff members are required to attend staff meetings/development days/collaboration days each week while school is in session.** Teacher meetings are important to the optimal functioning of the school, and excusal outside of emergency circumstances will not be given. Teachers are expected to schedule medical appointments outside of meeting times and make arrangements for child care such that they are able to be present for the duration of every scheduled meeting.

Classified staff is required to attend classified staff meetings. Classroom teachers or other direct supervisors of the support staff will need to adjust the work schedules in weeks that hourly staff will be attending meetings in order to stay within the maximum allowed hours per week. Staff children should only be present at staff meetings in emergency situations so that staff can share information freely. If children are in attendance,

please have appropriate activities planned for them in a location where they can be monitored by you and notify Director and staff members present of their attendance.

## Hours of Work, Breaks, Overtime, and Paydays

Wage & Hour Laws for Non-exempt and Exempt Employees

*All employees are expected to complete work duties within the hours recorded on the employee's offer of employment, including exempt employees. Exempt employees MUST submit to the School Director, in writing, a request to work beyond their contracted hours if they feel they must do so to complete their job duties. No exempt employee will be paid for work completed outside of contracted hours without written verification of approval from the School Director. Approval from any other employee or contractor of Sherwood Montessori besides the School Director to work outside of contracted hours or assigned hours as recorded on the employee's offer of employment will be considered invalid. Failure to comply with these stipulations will result in disciplinary action and may result in termination of employment.*

Two Part Test for Exemption

Minimum salary: Assumptions: 12 month work year, 40 hour work week $~~54,080~~58,240/year
$4,~~507~~853.34/month
Majority of Exempt Duties "customarily and regularly exercise discretion and independent judgment"
Typical Exemptions: Executive, Professional or Administrative exemption

Meal and Rest Periods

- Employees may not choose to waive his/her meal period and leave work a half an hour early
- Nonexempt employees working 6 hours must be provided with at least 30-minute duty free meal period
- Non-exempt employees must be provided with a second 30-minute meal period for work period of more than 10 hours per day
- Employees must be relieved of all duties during meal periods
- Employees should be permitted to leave the work site
- Meal periods are unpaid
- All meal periods should be reflected on the employee's timecards, e.g., clock out and clock back in
- Employers must "authorize and permit" paid rest periods for employees who work shifts of at least 3 ½ hours
- Rest periods must be approximately in the middle of each 4-hour work period and must be at least 10 minutes in length
- Employer may require employee to stay at the work site during rest periods
- Employee should acknowledge receipt of break periods

Overtime

Non-exempt employees must be paid for overtime worked, even if the employee did not get permission. The employee will be paid and it becomes a personnel issue in which the employee will receive disciplinary action.
Non-exempt employees must be paid 1 ½ times the "regular rate of pay" for:

-Hours worked in excess of 40 in a workweek
-Hours worked in excess of 8 hours (but fewer than 12 hours) in a workday
-The first 8 hours worked on the 7th consecutive day of work in a workweek

Non-exempt employees must be paid double an employee's "regular rate of pay" for:

-Hours worked in excess of 12 in a workday

-Hours worked in excess of 8 on the 7th consecutive day of work in a workweek

Hours worked on Saturdays and Sundays are treated like hours worked any other day.

Scheduling

Sherwood's cap on 27.5 hours/week for part time employees is related to benefits package.
Even when we are having fun, doing stuff we like to do and would choose to do on our own time, we are working if we are here and should not blur the line between volunteer and employee.

Teachers will work with classroom instructional aides to set a schedule that honors the 27.5 hour/week limit and optimizes the impact on student achievement, e.g., when we are doing in person instruction: a schedule that has the aide working the majority of the time the students are in the classroom. Teachers may request modifications to their aide's schedule, but these must be approved by the Director. The schedule (during in person instruction) will consider the playground supervision duties that are mandatory for all classroom aides and the meeting schedule for the classified staff.

Instructional and paraprofessional aides' that are not assigned to a classroom will have schedules set with the supervising teacher or administrator. These employees have the same factors to consider when creating a schedule in terms of the school budget and wage and labor laws, with the exception of playground supervision duties. Additional factors that will need to be considered include intervention group schedules and IEPs.

Schedules of all hourly employees must comply to labor laws regarding rest and meal breaks.

All schedules and changes of schedules will need final approval from the Director. Working outside one's approved schedule will result in disciplinary action up to and including termination.

Paydays

Paydays for all employees will be the last business day of the month.

# Salary Schedule & Movement on the Salary Schedule

Vertical Placement (Years of Experience)

Teachers new to Sherwood can bring 10 years' teaching experience into the Certificated Employee salary schedule. A new to Sherwood teacher will be placed at 10 years maximum at the beginning of the contract year and will qualify for a vertical movement at the completion of a 1.0 FTE year.
Years in private Montessori schools will count if teacher was trained in Montessori at the time of experience.
Years in public schools will count if teacher held a valid state credential at the time of experience.

It shall be the responsibility of the employee to provide written verification of previous experience from prior employers to the Director by September 30th.

Employees must have rendered paid service for 75% or more of the number of days in the regular school year, counting days of used sick leave, to advance one vertical step on the schedule.

Vertical movement on the salary schedule will occur as one space per year maximum and will only move once yearly at the start of the contract year (July 1st). No vertical movement will be made if the employee is at the maximum experience level allowed on the salary schedule. Movement on the salary schedule will follow completion of at least a 0.75 FTE year. Employees who work less than 0.75 FTE will advance one vertical step every other school year.

Horizontal Placement (Education Credits)

Column placement shall be based upon semester units verified by official transcripts. Pay scale shall not be determined until complete transcripts have been received. It shall be the responsibility of the employee to provide official transcripts and written to the Director. Teachers will need to provide official transcripts by June 1st to have units count toward next year's salary.

Only credits received through accredited colleges or universities will be considered. Credits paid for by Sherwood Montessori will not be counted toward horizontal movement on the salary schedule. Sherwood Montessori will have sole authority on number of credits awarded as it applies to horizontal movement on the salary schedule.

## Leaves of Absence

Sick Leave

As of January 1, 2016, classified staff may now accrue sick leave at a rate of one hour in sick leave bank for every 30 hours worked. These hours may be used in accordance to law: to recoup wages normally earned on days when the employee is sick or a family member of the employee is sick. Sick pay does not roll over year to year. If an employee is absent from work due to illness or illness of an immediate family member, hours will be paid out for all hours the employee has accumulated in her or his sick leave bank. Be sure to fill the Employee Absence Verification Form (see Appendices) upon return to work to document that the absence was due to illness and ensure that this gets communicated to the school's Business Manager for appropriate compensation.

Emergency Leave

Emergency leave is available to employees to provide for full salary and benefits for absences due to personal illness or injury that prevent the employee from working or for the following reasons:

1. Appearance in court as an interested party or under subpoena;
2. Death of an immediate family member;
3. An emergency caused by an accident or illness that requires the employee to be absent from work;
4. Emergency care for a sick family member.

Observance of religious holidays are not considered sick days.

Full-time staff shall accrue sick leave at the rate of ten (10) days per school year. If specified in the employee's contract, part-time staff, or staff working part of the school year shall accrue sick leave on a prorated basis to reflect the proportion of time or working months that the employee's schedule represents in relation to a full time schedule. Emergency leave is granted for only the reasons listed above and will not be paid out if not utilized, if the employee is terminated, or if the employee's contract is not renewed. All employees shall inform the Director of an anticipated absence as soon as possible, and such leave (other than for unexpected circumstances) must be preapproved by the Director. The Director may require an employee to verify the claimed reason for any absence.

Personal Leave

The Director may grant up to three (3) days, from the sum of the ten days of Emergency Leave, per employee per year for urgent personal business or other emergencies. Such leave shall be at full pay and benefits but with cost of substitute deducted. Such leave may not be accrued and will not be paid out for any reason if not used.

Long Term Leave

After the ten Emergency Leave days have been used, the employee may request Long Term Leave. Long Term Leave shall be defined as unpaid leave for pregnancy, post-childbirth maternity or paternity, adoption, employee long-term illness, and any other reasons required by law. The school may require certification from a qualified medical professional to document the reason for the leave and/or to verify the employee's ability to return to work. Such leave shall be given for a maximum of up to twelve (12) consecutive weeks, or longer if required by law. In no event shall such leave extend beyond the end of the employee's annual contract unless the contract is renewed. Such leave is available to all staff of Sherwood Montessori. Any health benefits provided to the employee by the school will continue to be provided during this leave. Whenever possible, such leave must be pre-approved by the Director and at least 30 days advance notice shall be given by the employee.

Jury Duty

Upon notification by a court to report for jury duty, the employee shall immediately request jury duty during non-school months. In the event this request is not granted, time off with no loss of salary limited to two (2) weeks will be provided for jury duty required to be served during the school year. Any employee, when advised of his/her notification of jury duty, must immediately inform the Director. Salary will be paid as usual, and the check for juror fees is to be signed over to the school.

Professional Development Leave

Full-time employees are entitled to the equivalent of one paid day during the school year for training purposes. Such training must be approved by the Director in advance. Additional days may be approved by the Director.

## Substitute Teachers and Substitute Aides

Approved leave days will require that a substitute be hired for the period of the leave. Teachers must have substitutes with an appropriate state credential. Classified staff must have an approved substitute from our substitute list who has been hired by the Director or Hiring Committee.

If a teacher or classified staff member is aware of the need for a substitute ahead of time, she or he is required to attempt to find a sub from the approved list. In the case of emergency or sudden illness, the employee should contact the Director, Administrative Assistant, and/or Office Manager to find a sub so that s/he may recuperate.

It will be the responsibility of the substitute to not overbook jobs. If a sub accepts a job from one Sherwood employee, s/he may not accept another job for that same period of time. This causes there to be an absence that is unfilled.

Substitutes should check in at the office to announce their presence on campus and receive an identification badge. If the sub is already on campus due to working an earlier shift, then switching to sub for another employee, the sub should still check in to the office so there is communication about who is where on campus in case of emergency.

Substitutes are required to follow all guidelines put forth in the ***Hours of Work, Breaks, Overtime, and Paydays***

section of this employee handbooks. Breaks and rest periods must be taken, overtime must be approved, and the 27.5 hour/week 5.5 hour/day limit must be followed. Any staff member who exceeds these hourly limits without prior approval from the School Director will be subject to disciplinary action up to and including termination of employment.

Because substitutes are usually not regular employees, it is the expectation that they may have questions regarding policies and procedures. Regular employees are expected to answer questions and give guidance to substitutes as best as they are able.

# Assignment and Reassignment Policies

Definitions

"Assignment," for these purposes , means the continued placement of an employee renewed for the following year in his/her existing position for the coming school year. An assignment does not include duties that are purely voluntary in nature.

"Reassignment" is a change in assignment at the same work location.

"Voluntary" refers to a reassignment that is requested by the employee renewed for the following year.

"Involuntary" refers to a reassignment initiated by the Director.

The Director will use the following non-prioritized criteria when determining an employee renewed for the following year's qualifications for a given position:

A. Credentials and certifications of the employee(s) renewed for the following year;
B. Training and experience related to the position(s);
C. Years of experience;
D. Documented educational program needs;
E. Documented skills and abilities of the employee(s) renewed for the following year;
F. Major and/or minor fields of study;
G. Advanced degrees related to the position(s);
H. Affirmative Action requirements;
I. Other, one-time criteria that is mutually agreed upon between the employee renewed for the following year and the Director.

General Provisions

Certificated Assignment Preference Form (CAPF): Once each year, certificated employees will be provided the opportunity to submit a Certificated Assignment Preference Form.

Each employee renewed for the following year shall return his/her CAPF to the Director for review.

The Director shall consider an employee renewed for the following year's CAPF and the criteria in the preceding list when making assignments and reassignments.

Each employee renewed for the following year shall be informed of his/her tentative assignment for the coming school year at least two (2) weeks prior to the last teacher work day of the school year.

Assignments

If an employee renewed for the following year's continued assignment requires an involuntary room change, the employee renewed for the following year will be paid two (2) days' pay at their daily rate for the express purpose of moving to a new classroom outside of the school day.

Reassignments

In addition to the listed criteria, the Director shall consider the employee renewed for the following year's annual CAPF submission when making staffing reassignments. Reassignments of certificated employees shall not be made for arbitrary, capricious or discriminatory reasons.

The Director shall confer with the certificated employee to discuss any reassignment either proposed by the Director or requested by the employee renewed for the following year through the CAPF.

If the employee renewed for the following year so requests, the Director must provide, in writing, the specific reasons for their reassignment or the denial of their requested reassignment, unless mutually agreed upon by the employee renewed for the following year and the Director.

Employees renewed for the following year whose reassignment requires involuntarily moving to a different classroom shall be paid two (2) full days' pay at their daily rate for the express purpose of moving to the new classroom outside of the school day.

*Reassignments Due to Enrollment Changes After the Beginning of the School Year*

An employee renewed for the following year may be involuntarily reassigned within the school at any time during the school year due to needs of the school to another subject matter or grade level assignment provided the new assignment falls within the employee renewed for the following year's credential(s).

Employees renewed for the following year to be reassigned during the school year shall be consulted prior to the reassignment and given at least five (5) days' advanced notice.

Employees renewed for the following year to be reassigned during the school year will receive, at their discretion, two (2) days of release time (or two(2) days' pay, if work is performed outside the regular work day for preparation and/or orientation to the new assignment.

Employees renewed for the following year to be reassigned during the school year will be given the reasons in writing, if the reasons are requested within five (5) days of notification.

Employees renewed for the following year involuntarily reassigned to another classroom shall be paid two (2) full days' pay at their daily rate for the express purpose of moving outside of the school day.

Grant-Funded Teaching Positions

The Director shall first seek to fill grant-funded teaching positions through the use of certificated employees who volunteer for these assignments.

Employees renewed for the following year working in grant-funded positions shall have return rights to their former position at the conclusion of the grant or at the end of the year, if requested by the employee renewed for the following year. This shall not apply if there have been modifications to the educational program at the employee renewed for the following year's former work site – in such case, the employee is subject to assignment/reassignment/transfer in the same manner as if he/she had not been in the grant-funded position.

## Employee Benefits

Full-time employees are entitled to group health and dental insurance coverage. This includes ~~all~~most employees who work over 30 hours per week on average over the year.

Sherwood Montessori will make all employer contributions as required by STRS, PERS, and Federal social security laws. ~~Certificated~~Full time certificated staff will have the opportunity to join STRS and full time classified staff will have the opportunity to join PERS. Sherwood Montessori will make contributions for workers' compensation insurance, unemployment insurance, and any other payroll obligations of an employer.

## Holidays & Paid Time Off

Full time, exempt employees will have paid holidays during the school year. Refer to the school calendar for exact days off.

## Internal Complaint Review

Complaints regarding allegations of harassment or discrimination should be made pursuant to the specific policies addressing those issues. The purpose of this "Internal Complaint Review Policy" is to afford all employees of the school the opportunity to seek internal resolution of their work-related concerns. All employees have free access to their immediate supervisors or to the Director to informally express their work-related concerns.

All efforts should be made to handle situations between the specific people involved. If there is a personal issue between two (2) employees, the employees should address the situation at that level first. The following procedure should be followed only if the situation cannot be resolved at the primary level.

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Filing of Complaint

If complaints cannot be resolved informally, employees may file a written complaint with the School Director as soon as possible after the events that give rise to the employee's work-related concerns. The written complaint should set forth in detail the basis for the employee's complaint. A complainant may request that the complaint be made verbally, however the School Director will record the complaint in a written format.

Investigation

An objective and timely investigation of all complaints which cannot be resolved informally will be undertaken. This includes meeting separately with the employee and with others who either are named in the complaint or who may have knowledge of the facts set forth in the complaint.
The School will attempt to treat all internal complaints and their investigation as confidential, recognizing, however, that in the course of investigating and resolving internal complaints some dissemination of information to others may be necessary or appropriate.
Upon completion of the investigation, the Director shall report the finding(s) to the employee in writing.

Non-Retaliation

If an employee has filed a complaint in good faith, the employee will not be disciplined or otherwise penalized for lodging the complaint. If an employee believes that he or she is being retaliated against for lodging a complaint, the employee should promptly notify the Director or Sherwood Board Chair.

Agenda Item B.3

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **MOU with Blue Oak for School Psychologist Services**

**Date:** August 19, 2021

---

**SUMMARY**

The Board will be asked to approve a final draft of the MOU with Blue Oak for School Psychologist Services

**DISCUSSION**

This MOU was previously approved by the Board at the May 20, 2021 meeting. Blue Oak requested we negotiate the cost of administrative fees which were previously 4%. The cost of administrative fees in this version of the contract has been reduced to 3%, which Blue Oak school leadership indicated would be acceptable.

**ACTION REQUESTED**

Approve MOU.

Attachment: Revised MOU with Blue Oak for School Psychologist services.

**Special Education Memorandum of Understanding between**
**Blue Oak Charter School and Sherwood Montessori**

This special education memorandum of understanding ("MOU" or "Agreement") is between Blue Oak Charter School ("BOCS") and Sherwood Montessori ("SM"), which are referred to as the "parties".

**RECITALS:**

A. BOCS is a charter school authorized by Chico Unified School District (CUSD). BOCS operates as an independent Local Education Agency ("LEA") member of the El Dorado County Charter SELPA for purposes of special education.

B. SM is a charter school authorized by the Chico Unified School District. SM operates as an independent LEA member of the El Dorado County Charter SELPA for purposes of special education.

C. BOCS wishes to contract with SM for SM's provision of School Psychology services to BOCS students, as more fully discussed in this MOU.

**NOW, THEREFORE,** in consideration of the promises and the mutual covenants and agreements herein set forth, the parties do hereby agree as follows:

## 1. Purpose

The purpose of the MOU is to ensure that BOCS students are provided with assessments in the area of school psychology services by SM when required and in conformity with their IEPs. It is agreed that BOCS shall retain all financial and legal responsibilities under the Individuals with Disabilities Education Improvement Act ("IDEA") and related federal and California laws for BOCS students served by SM in accordance with this MOU. BOCS shall remain liable for all complaints, mediations, due process matters and/or other litigation initiated by or on behalf of BOCS students which arise under such laws. SM's sole responsibility with respect to BOCS students is to assist BOCS in conducting psychological assessments, assisting in developing IEPs for students, and providing School Psychology services described in the students' IEPs. Thus, SM shall only be considered a service provider and not the responsible LEA for any BOCS student and shall incur no costs associated with the provision of these services, all of which shall be paid by BOCS as set forth in this MOU. Unless the parties agree otherwise in writing, SM is not required to provide anything beyond what is specifically identified in this MOU. Any and all additional assessments, program, placement and services shall be the responsibility of BOCS.

## 2. Evaluations/Assessments

At the request of BOCS, SM shall timely conduct initial and re-evaluation

assessments of students limited to the following areas: cognitive, psychological processing, social/emotional, behavior, academic performance, and communication. SM shall consult with BOCS staff when selecting and conducting assessments and shall assist BOCS staff in preparing the assessment plan.

## 3. Individualized Education Plan Development/FAPE

SM will assist BOCS in developing written individualized education plans (IEP) for students with exceptional needs through the IEP team process, by providing a School Psychologist at 0.6 FTE. A calendar outlining the expected workdays of the School Psychologist is attached in Exhibit A. BOCS shall be responsible for ensuring the IEP team shall have all legally mandated members, including but not limited to a BOCS administrator or designee. SM shall provide collaborative input to BOCS in its development of IEPs. SM shall participate in IEP meetings to report on assessments, or any other service provided under this MOU. BOCS and SM will collaboratively schedule all IEP meetings in which SM may be involved. A BOCS administrator or designee will serve as the Administrator of Record at each IEP meeting. BOCS shall be responsible to make an offer a free appropriate public education ("FAPE") for BOCS students.

SM shall do the following to assist in IEP development and implementation for BOCS students who receive Section 2 listed services pursuant to their IEP:

(a) Track referral, assessment, and all IEP timelines.

(b) Assist BOCS in drafting IEPs and IEP Addendums including present levels of performance, goals and objectives, accommodations and modification in the areas listed in section 2.

(c) Assist BOCS in developing its offer of FAPE related to the area listed in Section 2.

(d) Assist BOCS in ensuring that student's services listed in Section 2 are being implemented in accordance with the IEP.

(e) Assist BOCS with investigating and responding to compliance complaints, special education audits, and other investigations or complaints related to services listed in Section 2.

## 4. Special Education Services

The IEP team shall have responsibility for determining the appropriate placements and services for BOCS students with exceptional needs in accordance with applicable laws. BOCS shall be responsible for providing placements for special education students in accordance with the student's IEP, which shall be provided in the least restrictive environment and shall be consistent with state and federal laws and regulations.

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SM will provide the following services to BOCS related to special education functions, in accordance with the Fiscal Agreement identified in this MOU:

(a) SM will provide only school-based consultation services to special education students in accordance with their IEPs.

(b) In order to implement the services identified in paragraph 4(a), SM shall employ appropriately qualified personnel. SM school psychology staff and services will be provided both on and off the BOCS site, as SM and BOCS administrators determine appropriate.

(c) The school psychology staff will follow the calendar of SM.

**5. <u>Additional BOCS Obligations</u>**

BOCS shall:

(a) Pay SM for services identified herein, consistent with the Fiscal Agreement set forth in paragraph 9 below.

(b) Provide SM personnel with appropriate designated workspace for the delivery of services within BOCS buildings as assigned.

(c) Provide internet data connections in workspaces designated for SM personnel at the BOCS site.

(d) Be responsible for funding all regional program assessments and services through the El Dorado County Charter SELPA bill-back process.

(e) Contracting with any and all nonpublic agencies, nonpublic schools, or other providers for assessments, services, and placements of students, as necessary.

(f) Implement all general education accommodations, modifications, and services specified in students' IEPs.

(g) Ensure the attendance of appropriate BOCS personnel who are required to attend IEP meetings, including an BOCS administrator or designee and general education teacher(s).

(h) Store confidential files at the BOCS site.

(i) Provide all necessary low incidence materials and equipment in accordance with students' IEPs.

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(j) Provide psychologist with assessment results a minimum of 72 hours prior to a scheduled IEP meeting. The SM staff will communicate assessment results 24 hours prior to a scheduled IEP meeting.

## 6. Dispute Resolution

In the event that either party disputes the meaning of the terms of this agreement, the parties shall attempt to resolve the dispute in good faith first through a joint meeting of their representatives. If an agreement cannot be reached through the joint meeting, then the parties agree to attempt to resolve the dispute in a meeting with the El Dorado County Charter SELPA Director or their designee. If agreement cannot be reached with the assistance of the El Dorado County Charter SELPA, then any party may seek remedy in the appropriate court of law.

## 7. Due Process and/or Litigation

BOCS assumes full responsibility for the provision of communication assessments and speech and language therapy services to BOCS students. It shall be the financial and legal responsibility of BOCS to handle any and all legal disputes and claims, including but not limited to, negotiating settlement agreements, mediations, due process hearings, compliance complaints and any and all other legal actions related to a student's educational program pursuant to this MOU. If SM is named as a party to a legal dispute, BOCS will cooperate in dismissing, with prejudice, SM as a party. If BOCS is unable to obtain dismissal of SM as a party to a dispute, BOCS shall fully defend and indemnify SM in said proceedings in accordance with the Indemnification provision in paragraph 8 below. SM shall fully cooperate with BOCS in any legal dispute, including making its employees and documents available.

## 8. Indemnification

BOCS shall protect, defend, indemnify, forever hold harmless and assume the costs of defense, including attorneys' fees, of SM, its Board, officers, members, representatives, agents, guests, invitees, and/or employees, from and against any and all liabilities, claims, losses, judgments, damages, demands or expenses resulting from or related to the policies and procedures of the El Dorado Charter SELPA, the requirements of the IDEA, California Education Code section 56000 and following sections, Title 5 of the California Code of Regulations section 3000 and following sections, the Americans with Disabilities Act, and/or Section 504 or any other causes of action, including but not limited to actions related to or arising from SM's obligations under this Agreement. BOCS shall indemnify SM and its Board, officials, employees and agents against any remedies, including compensatory education, reimbursement, money damages, attorneys' fees and/or costs that may be awarded or agreed to, for failure to provide appropriate and/or compliant special education and related services.

## 9. Fiscal Agreement

SM will bill BOCS in advance for school psychology on a monthly basis, for 10 months, at the rate of:

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· School Psychology:

a. 0.6 FTE or equivalent of 117 days based on the employee's position on a contract of 195 working days. Any additional days of work required by BOCS shall be requested in writing and approved by both BOCS and SM administrators. BOCS will be billed at the employee's daily rate, daily benefit costs plus a 4% fee based on the daily amounts.

b. Sixty percent (60%) of the benefit cost of the employee, including STRS, payroll fees and other fees associated with an employee.

· Mileage rate equal to the IRS Standard Mileage Rates

· Actual costs of translation services as needed and requested by BOCS for any reports and assessments performed by SM staff.

· 3% Administrative Fee based upon the salary and benefit rates listed above.

BOCS has thirty (30) days from the date of billing to issue payment to SM.

**10. <u>Agreement / Term</u>**

(a) This MOU constitutes the entire understanding between parties and supersedes any prior or concurrent agreement, oral or written, between or among SM and/or BOCS concerning its subject matter. Any modification to this MOU shall be effective only if in writing and signed by all parties. If any provision or any part of this MOU is for any reason held to be invalid or unenforceable or contrary to public policy, law, or statute, and/or ordinance, the remaining provisions of this MOU shall not be affected thereby and shall remain valid and fully enforceable.

(b) The term of this Agreement and services shall commence on July 1, 2021 and continue through June 30, 2022.

(c) SM will seek advisement and input from BOCS in regards to periodic program evaluation and evaluating delivery of psychological services. BOCS retains the ability to perform an independent evaluation of the School Psychologist services provided. SM retains the sole responsibility to perform staff evaluations of SM employees who implement services in accordance with this MOU; however, SM is invited to collaborate with BOCS staff in this regard as needed.

(d) This Agreement has been made and entered into the State of California and the laws of said State will govern the validity and interpretation of this Agreement.

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(e) The persons signing this MOU warrant that they are duly authorized to sign it on behalf of the persons and entities being bound.

This Agreement may be executed in counterparts, all of which, taken together, shall be deemed an original.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the date and year first above written.

**On Behalf of Blue Oak Charter School**

Date: _____

By: _____BOCS Director

By: _____ BOCS Board Chairperson

**On Behalf of Sherwood Montessori**

Date: _____

By: _____ SM Director

By: _____ SM Board Chairperson

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Agenda Item B.4

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Policy for the Education of Children Who Are Homeless**

**Date:** August 19, 2021

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**SUMMARY**

Any school that applies for categorical programs must have a board policy on educating children who are homeless.

**DISCUSSION**

The attached draft policy contains all the needed legal elements for a Homeless Educaiton Policy, required for LEAs receiving federal funds through categorical programs.

**ACTION REQUESTED**

Adopt policy.

Attachment: Policy for the Education of Children Who Are Homeless.

SHERWOOD MONTESSORI

**Education for Children Who are Homeless**

The Board of Directors of Sherwood Montessori desires to ensure that homeless students have access to the same free and appropriate public education provided to other students. Sherwood shall provide homeless students with access to education and other services necessary for them to meet the same challenging academic standards as other students.

The Director or designee shall identify and remove any barriers to the identification and enrollment of homeless students and to the retention of homeless students due to absences or outstanding fees or fines

When there are at least 15 homeless students enrolled, Sherwood's local control and accountability plan (LCAP) shall include goals and specific actions to improve student achievement and other outcomes of homeless students.

The School Director or designee shall designate an appropriate staff person to serve as a liaison for homeless children and youths. The Homeless Education Liaison shall fulfill the duties specified in 42 USC 11432 to assist in identifying and supporting homeless students to succeed in school.

In order to identify district students who are homeless, the School Director or designee may give a housing questionnaire to all parents/guardians during school registration, make referral forms readily available, include the district liaison's contact information on the district and school web sites, provide materials in a language easily understood by families and students, provide school staff with professional development on the definition and signs of homelessness, and contact appropriate local agencies to coordinate referrals for homeless children and youth and unaccompanied youth.

Information about a homeless student's living situation shall be considered part of a student's educational record, subject to the Family Educational Rights and Privacy Act and shall not be deemed to be directory information as defined in 20 USC 1232g.

The Director or designee shall ensure that placement decisions for homeless students are based on the student's best interest as defined in law and administrative regulation.

Each homeless student shall be provided services that are comparable to services offered to other students in the school, including, but not limited to, transportation, educational programs for which the student meets the eligibility criteria (such as federal Title I services or similar state or local programs, programs for students with disabilities, and educational programs for English learners), career and technical education programs, programs for gifted and talented students, and school nutrition programs. (42 USC 11432)

Homeless students shall not be segregated into a separate program based on their status as homeless and shall not be stigmatized in any way. However, the Director or designee may separate homeless students on school grounds as necessary for short periods of time for

health and safety emergencies or to provide temporary, special, and supplementary services to meet the unique needs of homeless students.

The Director or designee shall coordinate with other agencies and entities to ensure that homeless children and youth are promptly identified, ensure that homeless students have access to and are in reasonable proximity to available education and related support services, and raise the awareness of school personnel and service providers of the effects of short-term stays in a shelter and other challenges associated with homelessness. Toward these ends, the Director or designee shall collaborate with local social services agencies, other agencies or entities providing services to homeless children and youth, and, if applicable, transitional housing facilities. In addition, the Director or designee shall coordinate transportation as provided to other Sherwood students, transfer of school records, and other interdistrict activities with other local educational agencies. As necessary, the Director or designee shall coordinate, within the district and with other involved local educational agencies, services for homeless students and services for students with disabilities.

The Homeless Education Liaisons and other appropriate staff shall participate in required professional development and other technical assistance activities to assist them in identifying and meeting the needs of homeless students and to provide training on the definitions of terms related to homelessness.

Agenda Item B.5

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Consolidated Application**

**Date:** August 19, 2021

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**SUMMARY**

The application for categorical programs must be approved by the Board.

**DISCUSSION**

In order to received ESSER funds from the U.S. Department of Education, Sherwood must apply for categorical program funding. The application is required to be approved by the Board of Directors.

**ACTION REQUESTED**

Approve Consolidated Application for categorical programs.

Attachment: Categorical Programs Application

California Department of EDUCATION

CONSOLIDATED APPLICATION AND REPORTING SYSTEM (CARS)

Sherwood Montessori (04 61424 0121475)



# 2021-22 Application for Funding

*Required fields are denoted with an asterisk (*).*

## Local Governing Board Approval

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

Date of approval by local governing board: 08/19/2021 (ex. MM/DD/YYYY)

## District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

DELAC representative's full name:
(non-LEA employee)

DELAC review date:

Meeting minutes web address:
Please enter the web address of DELAC review meeting minutes (format http://SomeWebsiteName.xxx). If a web address is not available, then the LEA must keep the minutes on file which indicate that the application was reviewed by the committee.

DELAC comment:
If an advisory committee refused to review the application, or if DELAC review is not applicable, enter a comment. (Maximum 500 characters)

N/A fewer than 20 English learners

## Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

| | |
|---|---|
| *** Title I, Part A (Basic Grant):**<br>ESSA Sec. 1111 et seq.<br>SACS 3010 | ○ No ◉ Yes |
| *** Title II, Part A (Supporting Effective Instruction):**<br>ESEA Sec. 2104<br>SACS 4035 | ○ No ◉ Yes |
| *** Title III English Learner:**<br>ESEA Sec. 3102<br>SACS 4203 | ○ No ◉ Yes |
| *** Title III Immigrant:**<br>ESEA Sec. 3102<br>SACS 4201 | ○ No ◉ Yes |
| *** Title IV, Part A (Student and School Support):**<br>ESSA Sec. 4101<br>SACS 4127 | ○ No ◉ Yes |

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Agenda Item E.2.1

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** August 19, 2021

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**Administrative**

- Current enrollment will be reported at the meeting.
- Our building project at 1010 is still waiting final approval for occupancy permits. The middle school is meeting in the school library for now. When the permits are approved, we will be able to call our movers to empty our shed of kitchen equipment and store all currently unneeded furnishings and equipment in the space created in the shed.
- We have some new staff members who are joining us for the 2021-2022 school year:

| New Staff Member | Position |
|---|---|
| Molly Makel | Director of MTSS |
| Tammy German | School Psychologist |
| Anna Meehan | Speech and Language Pathologist |
| Haley Cramer | Teacher's Aide in Kim Powers' 1/2 class |
| Caitlin McKinnon | Teacher's Aide in Anne Adams' 1/2/3 class |
| Dustin Murgia | Teacher's Aide in Sheng Vang's 4/5/6 class |
| Sally Van Tassel | Learning Center/Paraprofessional Aide |
| Jocelyn Lopez | Learning Center/Paraprofessional Aide |
| Elizabeth Gifford | Learning Center/Paraprofessional Aide |
| Laura Swanson | Counselor |
| Acacia Fellner | Extended Day Aide |
| Hannah Madsen | Extended Day Aide |
| Shawna Dorn | Extended Day Aide |
| Brenda Brown (returning staff, new assignment) | Extended Day Coordinator |
| Anne Adams (returning staff, new assignment) | Teacher 1/2/3 class |

**Safety**

- We are monitoring air quality and adjusting our activities according to guidance, i.e.: indoor lunch/recess and PE on unhealthy days.
- Current guidance recommends all adults wear masks indoors while in the presence of

children, regardless of vaccination status.

- The California Department of Public Health issued a new order that requires school employees produce proof of vaccination or submit to at least weekly Covid-19 tests.

**Legislative**

- Lawmakers return to the capitol this week after summer recess; we should soon have news regarding what the final version of the trailer bills will be and how it will effect our school.

# SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Agenda Item , Treasurer's Report**

**Date:** August 19, 2021 Board Meetings

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of July 2021 reconciled with, or matched, those of the school's internal reports. The ending cash balance totaled $ 699,787.68 as of July 30, 2021 for the checking account and $50,000 in the special account to assure the contract work at 1010 Cleveland is completed.
- There were no unusual high-cost expenses in July.

Profit & Loss

- BOCE informed the Business Manager that deferral payments of Local Control Funds will be available for deposit the first week of September. July expenses were minimal.

Balance Sheet,

- The audit field work has begun and adjustments will be made after all receivables and payables are known.

Cash Flow

- The school is projected to end the year with a positive cash balance.

Agenda Item E.3.1

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Appointment of Board Members**

**Date:** August 19, 2021

---

**SUMMARY**

The Board will be asked to appoint directors to the open seats on the Board.

**DISCUSSION**

We currently have open seats on the Board that should be filled by approval of a majority of the board as described in Section 10, Article 4 of the bylaws, until an election can be held:

**SECTION 10. VACANCIES**

Vacancies on the Board of Directors shall exist from (1) the death; resignation or removal of any Director, and (2) whenever the number of authorized Directors is increased.

The Board of Directors may declare vacant the office of a Director, who has been declared of unsound mind by a final order of court, or convicted of a felony, or been found by a final order or judgment of any court to have breached any duty under Section 5230 and following of the California Nonprofit Public Benefit Corporation Law.

Directors may be removed without cause by a two-thirds majority of the Directors then in office.

Any Director may resign effective upon giving written notice to the Chair of the Board, the Secretary, or the Board of Directors, unless the notice specifies a later time for the effectiveness of such resignation. No Director may resign if the corporation would then be left without a duly elected Director in charge of its affairs, except upon notice to the Attorney General.

Vacancies on the board may be filled by approval of the board, or, if the number of Directors then in office is less than a quorum, by (1) the unanimous written consent of the Directors then in office or (2) the affirmative vote of a majority of the Directors then in office at a meeting held pursuant to notice or waivers of notice complying with this Article of these Bylaws.

A person elected to fill a vacancy as provided by this Section, shall hold office until the next annual election of the Board of Directors or until his or her death, resignation or removal from office.

**ACTION REQUESTED**

Appoint directors.

Agenda Item E.3.2

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Election of Officers**

**Date:** August 19, 2021

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**SUMMARY**

The following officers are required to fulfill our charter: Chair, Vice Chair, Treasurer and Secretary.

**DISCUSSION**

Article 5 of the Bylaws of the Board of Directors describes the action to take when there are vacancies and the duties of the offices:

**SECTION 5. VACANCIES**

Any vacancy caused by the death, resignation, removal, disqualification, or otherwise, of any officer shall be filled by the Board of Directors. In the event of a vacancy in any office other than that of Chair, such vacancy may be filled temporarily by appointment by the Chair until such time as the Board shall fill the vacancy. Vacancies occurring in offices of officers appointed at the discretion of the board may or may not be filled as the board shall determine. An Interim Chair may be appointed by the outgoing Chair in the case where the position of Vice-Chair is vacant, and/or the current Vice-Chair unable to accept the longer term duties of the Chair and /or there are less than four current Directors to fulfill the requirements of a voting quorum. The Interim Chair shall serve in this capacity until the next annual election of the Board of Directors, typically held in May.

**SECTION 6. DUTIES OF CHAIR**

The Chair shall be the Chief Executive Officer of the corporation and shall, subject to the control of the Board of Directors, supervise and control the affairs of the corporation and the activities of the officers. He or she shall perform all duties incident to his or her office and such other duties as may be required by law, by the Articles of Incorporation of this corporation, or by these Bylaws, or which may be prescribed from time to time by the Board of Directors. Unless another person is specifically appointed as Chair of the Board of Directors, he or she shall preside at all meetings of the Board of Directors.

Except as otherwise expressly provided by law, by the Articles of Incorporation, or by these Bylaws, he or she shall, in the name of the corporation, execute such deeds, mortgages, bonds, contracts, checks, or other instruments which may from time to time be authorized by the Board of Directors.

**SECTION 7. DUTIES OF VICE-CHAIR**

In the absence of the Chair, or in the event of his or her inability or refusal to act, the Vice-Chair shall perform all the duties of the Chair, and when so acting shall have all the powers of, and be subject to all the restrictions on, the Chair. The Vice-Chair shall have other powers and perform such other duties as may be prescribed by law, by the Articles of Incorporation, or by these Bylaws, or as may be prescribed by the Board of Directors.

**SECTION 8. DUTIES OF SECRETARY**

The Secretary shall:

1. Certify and keep at the principal office of the corporation the original, or a copy of these Bylaws as amended or otherwise altered to date;

2. Keep at the principal office of the corporation or at such other place as the board may determine, a book of minutes of all meetings of the Board of Directors, and, if applicable, meetings of committees of Directors, recording therein the time and place of holding, whether regular or special, how called, how notice thereof was given, the names of those present or represented at the meeting, and the proceedings thereof;

3. See that all notices are duly given in accordance with the provisions of these Bylaws or as required by law;

4. Be custodian of the records;

5. Exhibit at all reasonable times to any Director of the corporation, or to his or her agent or attorney, on request therefore, the Bylaws, and the minutes of the proceedings of the Directors of the corporation. In general, perform all duties incident to the office of Secretary, and such other duties as may be required by law, by the Articles of Incorporation of this corporation, or by these Bylaws, or which may be assigned to him or her from time to time by the Board of Directors.

**SECTION 9. DUTIES OF TREASURER**

Subject to the provisions of these Bylaws relating to the "Execution of Instruments, Deposits and Funds," the Treasurer shall:

1. Have oversight responsibility for all funds and securities of the corporation, and deposit and/or provide direction to the School Director to deposit all such funds in the name of the corporation in such banks, trust companies, or other depositories as shall be selected by the Board of Directors;

2. Provide review, perspective and advice to the Board with regard to the integrity of financial statements, the validity of financial projections and the viability of the financial condition of the corporation;

3. Prepare, or cause to be prepared, and certify, or cause to be certified, the financial statements to be included in any required reports including the Annual Budget, First and Second Interim Budget Reports, and Final Unaudited Actuals;

4. Provide access at all reasonable times to the books of account and financial records to any Director of the corporation, or to his or her agent or attorney, on request therefore;

5. Perform all duties incident to the office of Treasurer and such other duties as may be required by law, by the Articles of Incorporation of the corporation, or by these Bylaws, or which may be assigned to him or her from time to time by the Board of Directors.

**ACTION REQUESTED**

Elect board officers.

Agenda Item E.3.3

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Independent Study**

**Date:** August 19, 2021

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**SUMMARY**

It may benefit the students and the school to offer an Independent Study program.

**DISCUSSION**

When the legislature went on recess in July, the Education Omnibus Trailer Bill, AB 130, had language that directed Districts and County Offices of Education to create independent study options for families who were unable to attend in-person school due to the pandemic. It also had language that put a moratorium on non classroom-based charter schools. A school like Sherwood would be prohibited from enrolling more than 20% of its ADA (Average Daily Attendance) in an independent study program.

In addition to the moratorium limits, the regulations for distance learning were set to replace the former independent study program regulations. The current law requires daily interaction and instruction for students enrolled in the program, with a credentialed teacher assigned to the student. After the 2020-2021 school year experiment with hybrid education, we found that it was a tremendous burden for teachers to have both in-person and distance learning students. Our current school budget has only in-person teachers on the payroll.

Other elements of the law require a tiered response to lack of engagement or attendance. During distance learning, some families were able to provide student support needed for academic growth while others struggled. This tiered response as well as all other changes in the law would require a revised independent study policy be adopted.

Another consideration regarding AB 130 as of the July recess is that it fails to mention charters as being included in the pre-pandemic ADA funding freeze. District schools and county offices of education have the choice to be funded according to their ADA before

March, 2020, but currently charters are not mentioned as having that option. If the bill is not amended to include charters, Sherwood will be funded only for the currently enrolled students, and only for the days they attend school.

Funding could be recouped by providing independent study for students who take days off for vacations, as we did during pre-Covid times, and for times when they are required to isolate due to illness or exposure. This would require hiring another teacher and predicting how many days students could recoup through independent study before reaching the 20% limit.

Some classroom-based charter schools are updating independent study policies and offering full distance learning programs, others are offering independent study for students who require a short-term program due to illness or exposure to illness or other short-term needs. At this point, lack of clarity from the legislature has led us to suspend our independent study program as it was pre-Covid and during mandated distance learning. This agenda item is to allow for a discussion of what Sherwood's independent study program might be and seek approval for the development of the program.

**ACTION REQUESTED**

Approve implementation of an Independent Study Program.

Agenda Item E.3.4

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **ESSER III Expenditure Plan**

**Date:** August 19, 2021

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**SUMMARY**

ESSER III funds require a plan be adopted at a Board meeting by September 30th, 2021.

**DISCUSSION**

LEAs that receive Elementary and Secondary School Emergency Relief (ESSER) funds are to create a plan that describes how the funds will be used to facilitate safe, in-person instruction and address learning loss.

The presentation of this draft of a plan gives stakeholders an opportunity to give input in its creation. The plan is based of stakeholder input collected during the 2020-2021 school year and expands on some of the ideas put forward in the LCAP (Local Control Accountability Plan) and ELO (Expanded Learning Opportunities).

**ACTION REQUESTED**

Discuss plan.

# ESSER III Expenditure Plan

| Local Educational Agency (LEA) Name | Contact Name and Title | Email and Phone |
|---|---|---|
| Sherwood Montessori | Michelle Yezbick<br>Director, Sherwood Montessori | michelle@sherwoodmontessori.org<br>(530) 345-6600 |

School districts, county offices of education, or charter schools, collectively known as LEAs, that receive Elementary and Secondary School Emergency Relief (ESSER) funds under the American Rescue Plan Act, referred to as ESSER III funds, are required to develop a plan for how they will use their ESSER III funds. In the plan, an LEA must explain how it intends to use its ESSER III funds to address students' academic, social, emotional, and mental health needs, as well as any opportunity gaps that existed before, and were worsened by, the COVID-19 pandemic. An LEA may also use its ESSER III funds in other ways, as detailed in the Fiscal Requirements section of the Instructions. In developing the plan, the LEA has flexibility to include community input and/or actions included in other planning documents, such as the Local Control and Accountability Plan (LCAP), provided that the input and actions are relevant to the LEA's Plan to support students.

For more information please see the Instructions.

## Other LEA Plans Referenced in this Plan

| Plan Title | Where the Plan May Be Accessed |
|---|---|
| Sherwood Montessori ESSER III Expenditure Plan | This plan describes the actions and funding to complete actions the school will take to offer safe in-person learning, address negative impacts on learning that school closure had, and providing interventions to address student needs. |

## Summary of Planned ESSER III Expenditures

Below is a summary of the ESSER III funds received by the LEA and how the LEA intends to expend these funds in support of students.

| Total ESSER III funds received by the LEA |
|---|
| $196,383 |

| Plan Section | Total Planned ESSER III |
|---|---|
| Strategies for Continuous and Safe In-Person Learning | $146,383 |
| Addressing Lost Instructional Time (a minimum of 20 percent of the LEAs ESSER III funds) | $50,000 |
| Use of Any Remaining Funds | |

**Total ESSER III funds included in this plan**

$196,383

## Community Engagement

An LEA's decisions about how to use its ESSER III funds will directly impact the students, families, and the local community. The following is a description of how the LEA meaningfully consulted with its community members in determining the prevention and mitigation strategies, strategies to address the academic impact of lost instructional time, and any other strategies or activities to be implemented by the LEA. In developing the plan, the LEA has flexibility to include input received from community members during the development of other LEA Plans, such as the LCAP, provided that the input is relevant to the development of the LEA's ESSER III Expenditure Plan.

For specific requirements, including a list of the community members that an LEA is required to consult with, please see the Community Engagement section of the Instructions.

A description of the efforts made by the LEA to meaningfully consult with its required community members and the opportunities provided by the LEA for public input in the development of the plan.

Sherwood has used community surveys annually to develop its LCAP and in 2020-2021 the Extended Learning Opportunities Grant Plan. The survey polled all parents, family member, teachers, staff and community members who were asked to evaluate their experiences and give input regarding what they would like to see in terms of school improvement. Student surveys are also given with questions tailored for their experiences. Last year, input was sought for revised questions to capture the experiences of the students and families during distance learning. Focus group members analyzed the data and prepared a presentation for public meetings of the board of directors. A draft of the plan was vetted at the public meetings and the final plan is posted on the school's website.

This Expenditure Plan for the ESSER III funds is also being presented at an open, public meeting of the board of directors with an invitation for attendees to give input. The school calendar includes four Town Hall meetings that will be held via Zoom to give stakeholders more opportunities to share their experiences and hopes for the school's programs to address safe in-person instruction and mitigation of learning loss that occurred during school closure.

A description of how the development of the plan was influenced by community input.

Survey questions asked parents if they would value and take advantage of programs to address learning loss, such as summer school and free tutoring after school. Tracking school expenditures on PPE gave good data that indicated that families wanted and/or needed the school to provide facial masks for students and staff. The safety plan for in-person learning was vetted at public board meetings and at town hall style meetings. The continuously increasing number of parents who chose to include their students in in-person learning beginning in October, 2020 was good data indicating that safety protocols were appreciated and investments in the materials and equipment needed to carry out the plan were sound.

Stakeholders have indicated that the following actions would be valuable to the students, families, faculty and staff of Sherwood Montessori:

- Expanded learning options during the summer prior to the 2021-2022 school year.
- Free child care before and after school, with after school including tutoring for students who attend for the first hour.
- A newly designed and furnished child care environment in which to provide tutoring and child care.
- Healthy snacks and meals provided free of cost.
- Counseling available on site in a new counseling environment.
- A school psychologist available for staff and faculty to consult with regarding student needs.
- PPE provided by the school for students and staff.
- Air purifiers to provide the best possible ventilation.
- A gardening/outdoor education program that includes expanded and beautified garden areas for supporting student and staff mental wellness.
- A Director of MTSS (Multi-Tiered System of Support) to ensure the smooth functioning of an expanded system for intervention.
- Training for staff in multiple strategies and programs to respond to addressing learning loss and mental wellness.
- Purchases of programs and materials to address learning loss and mental wellness.
- Purchase of additional technology as needed to support safe in-person instruction, which may include short-term distance learning for students who are ill or exposed.
- Additional substitute salary and benefits costs to cover staff who need time off to address illness, exposure, or family medical needs.

# Actions and Expenditures to Address Student Needs

The following is the LEA's plan for using its ESSER III funds to meet students' academic, social, emotional, and mental health needs, as well as how the LEA will address the opportunity gaps that existed before, and were exacerbated by, the COVID-19 pandemic. In developing the plan, the LEA has the flexibility to include actions described in existing plans, including the LCAP and/or Expanded Learning Opportunity (ELO) Grant Plan, to the extent that the action(s) address the requirements of the ESSER III Expenditure Plan.

For specific requirements, please refer to the Actions and Expenditures to Address Student Needs section of the Instructions.

## Strategies for Continuous and Safe In-Person Learning

A description of how the LEA will use funds to continuously and safely operate schools for in-person learning in a way that reduces or prevents the spread of the COVID-19 virus.

**Total ESSER III funds being used to implement strategies for continuous and safe in-person learning**

| Plan Alignment (if applicable) | Action Title | Action Description | Planned ESSER III Funded Expenditures |
|---|---|---|---|
| IPI 1.A | PPE | PPE will be provided by the school for students and staff | |
| IPI 2.A | Ventilation | Air purifiers will be provided to provide the best possible ventilation | |
| IPI 3. A | Technology | Purchase of additional technology as needed to support safe in-person instruction | |
| IPI 4. A | Substitutes | Additional substitute salary and benefits to cover costs for staff who are ill, isolating after exposure, or absent due to family medical care needs | |

## Addressing the Impact of Lost Instructional Time

A description of how the LEA will use funds to address the academic impact of lost instructional time.

**Total ESSER III funds being used to address the academic impact of lost instructional time**

| Plan Alignment (if applicable) | Action Title | Action Description | Planned ESSER III Funded Expenditures |
|---|---|---|---|
| LIT 1.A | Tutoring-Child Care | Free child care before and after school, with after school including tutoring for students who attend for the first hour. | |

| Plan Alignment (if applicable) | Action Title | Action Description | Planned ESSER III Funded Expenditures |
|---|---|---|---|
| LIT 2.A | Mental Wellness | Counseling available on site in a new counseling environment. | |
| LIT 2.B | Mental Wellness | A school psychologist available for staff and faculty to consult with regarding student needs. | |
| LIT 2.C | Mental Wellness | A gardening/outdoor education program that includes expanded and beautified garden areas for supporting student and staff mental wellness. | |
| LIT 2.D | Mental Wellness | Purchases of programs and materials to address mental wellness. | |
| LIT 2.E | Mental Wellness | Training for staff in multiple strategies and programs to address learning loss and mental wellness. | |
| LIT 2.F | Mental Wellness | Implementation of PBIS: Positive Behavior Interventions and Support | |
| LIT 2.G | Mental Wellness | Training for staff on Anti-Bias Anit-Racist practices in school to ensure inclusion of all students. | |
| LIT 3.A | Academic Interventions | A Director of MTSS (Multi-Tiered System of Support) to ensure the smooth functioning of an expanded system for intervention. | |
| LIT 3.B | Academic Interventions | Training for staff in multiple strategies and programs to address learning loss. | |
| LIT 3.C | Academic Interventions | Purchases of programs and materials to address learning loss. | |

## Use of Any Remaining Funds

A description of the how the LEA will use any remaining ESSER III funds, as applicable.

| Total ESSER III funds being used to implement additional actions |
|---|
| |

| Plan Alignment (if applicable) | Action Title | Action Description | Planned ESSER III Funded Expenditures |
|---|---|---|---|
| HK 1.A | Healthy Kids Free snacks and meals | School will provide healthy snacks and meals for kids | |

# Ensuring Interventions are Addressing Student Needs

The LEA is required to ensure its interventions will respond to the academic, social, emotional, and mental health needs of all students, and particularly those students most impacted by the COVID–19 pandemic. The following is the LEA's plan for ensuring that the actions and expenditures in the plan are addressing the identified academic, social, emotional, and mental health needs of its students, and particularly those students most impacted by the COVID–19 pandemic.

| Action Title(s) | How Progress will be Monitored | Frequency of Progress Monitoring |
|---|---|---|
| Multi-Tiered System of Supports | Formal assessment data is collected for all students three times a year for reading, math and writing. For reading, protocols developed by the Columbia Teachers College Reading and Writing Project are used with benchmark texts. The protocols measure accuracy, fluency, and comprehension to identify which level text would be the instructional level and which is an independent level. Sherwood will be using Star Renaissance Assessments for math, as well as another measure for reading and writing.<br><br>For writing, in addition to Star Renaissance Writing Assessment, teachers give a prompt to students at the beginning and end of the year and analyze the writing with rubrics developed from the English Language Arts Common Core State Standards by the California Department of Education. | Formal assessment data is collected for all students three times a year for reading and math and two times a year for writing. Students who have been identified for Tier 2 level services/SST will have progress monitored according to the SST plan, usually every 6-8 weeks. |

| Action Title(s) | How Progress will be Monitored | Frequency of Progress Monitoring |
|---|---|---|
| | The Basic Phonics and Spelling Test (BPST) is used with pre-readers and emergent readers and students in grades one through six and up take a spelling inventory assessment to identify in which developmental stage of spelling they are functioning.<br><br>Sherwood has implemented Positive Behavior Interventions and Supports (PBIS) and tracks behavior incidents in the SWIS database (School-Wide Information System). Montessori teachers also use anecdotal notes taken while observing students during the work period as another assessment tool.<br><br>If these data suggests that a student is struggling to reach grade level or behavioral expectations, the classroom teacher will immediately begin to adapt the lessons and curriculum to find the optimal level for instruction. Each modification is recorded, as is each strategy that is attempted. If the student does not respond to these modifications after six to eight weeks, a referral is formally made to the Student Success Team (SST) with the data collected.<br><br>The Student Success Team (SST) is a general education function and is composed of the school director, student‘s teacher, parent and other school personnel, depending on the nature of the referral. The primary function of the SST is to identify, discuss and recommend interventions to address the needs of the student and to support the teacher in meeting these identified needs. Anyone who has a concern for a student may refer the student to the SST for consideration. As the success of | |

| Action Title(s) | How Progress will be Monitored | Frequency of Progress Monitoring |
| --- | --- | --- |
| | every student is a primary pillar of Sherwood Montessori, students who are identified by their teacher as needing extra support or services, whether because of academic troubles, being a high achieving student who needs additional challenges, issues with behavior or emotional issues, or other concerns can be referred to the SST.<br><br>If all appropriate school based interventions have been exhausted, the student may be referred for an assessment for special education services. | |

# ESSER III Expenditure Plan Instructions

## Introduction

School districts, county offices of education (COEs), or charter schools, collectively known as local educational agencies (LEAs), that receive Elementary and Secondary School Emergency Relief (ESSER) funds under the American Rescue Plan (ARP) Act, referred to as ESSER III funds, are required to develop a plan for how they will use ESSER III funds to, at a minimum, address students' academic, social, emotional, and mental health needs, as well as the opportunity gaps that existed before, and were exacerbated by, the COVID-19 pandemic.

The plan must be adopted by the local governing board or body of the LEA at a public meeting on or before October 29, 2021 and must be submitted for review and approval within five days of adoption. A school district must submit its ESSER III Expenditure Plan to its COE for review and approval; a COE must submit its plan to the California Department of Education for review and approval. A charter school must submit its plan to its chartering authority for review and to the COE of the county in which the charter school operates for review and approval.

In addition, consistent with the requirements of the ARP, Volume 86, *Federal Register*, page 21201, April 22, 2021, the ESSER III Expenditure Plan must be:

- Written in an understandable and uniform format;
- Written in a language that parents can understand, to the extent practicable;
    - If it is not practicable to provide written translations to a parent with limited English proficiency, the plan must be orally translated for parents
- Provided in an alternative format to a parent who is an individual with a disability as defined by the Americans with Disabilities Act, upon request; and
- Be made publicly available on the LEA's website.

For additional information regarding ESSER III funding please see the ARP Act Funding web page at https://www.cde.ca.gov/fg/cr/arpact.asp.

*For technical assistance related to the completion of the ESSER III Expenditure Plan, please contact EDReliefFunds@cde.ca.gov.*

## Fiscal Requirements

- The LEA must use at least 20 percent (20%) of its ESSER III apportionment for expenditures related to addressing the academic impact of lost instructional time through the implementation of evidence-based interventions, such as summer learning or summer enrichment, extended day, comprehensive afterschool programs, or extended school year programs.
    - For purposes of this requirement, "evidence-based interventions" include practices or programs that have **evidence** to show that they are effective at producing results and improving outcomes when implemented. This kind of evidence has generally been produced through formal studies and research. There are four tiers, or levels, of evidence:

        - **Tier 1 – Strong Evidence**: the effectiveness of the practices or programs is supported by one or more well-designed and well-implemented randomized control experimental studies.
        - **Tier 2 – Moderate Evidence**: the effectiveness of the practices or programs is supported by one or more well-designed and well-implemented quasi-experimental studies.
        - **Tier 3 – Promising Evidence**: the effectiveness of the practices or programs is supported by one or more well-designed and well-implemented correlational studies (with statistical controls for selection bias).
        - **Tier 4 – Demonstrates a Rationale**: practices that have a well-defined logic model or theory of action, are supported by research, and have some effort underway by a State Educational Agency, LEA, or outside research organization to determine their effectiveness.
    - **For additional information please see the Evidence-Based Interventions Under the ESSA web page at https://www.cde.ca.gov/re/es/evidence.asp.**
- The LEA must use the remaining ESSER III funds consistent with section 2001(e)(2) of the ARP Act, including for:
    - Any activity authorized by the Elementary and Secondary Education Act (ESEA) of 1965;
    - Any activity authorized by the Individuals with Disabilities Education Act (IDEA);
    - Any activity authorized by the Adult Education and Family Literacy Act;
    - Any activity authorized by the Carl D. Perkins Career and Technical Education Act of 2006;
    - Coordination of preparedness and response efforts of LEAs with State, local, Tribal, and territorial public health departments, and other relevant agencies, to improve coordinated responses among such entities to prevent, prepare for, and respond to COVID-19;
    - Activities to address the unique needs of low-income students, students with disabilities, English learners, racial and ethnic minorities, homeless students, and foster youth, including how outreach and service delivery will meet the needs of each population;
    - Developing and implementing procedures and systems to improve the preparedness and response efforts of LEAs;
    - Training and professional development for staff of the LEA on sanitation and minimizing the spread of infectious diseases;
    - Purchasing supplies to sanitize and clean the facilities of an LEA, including buildings operated by such agency;
    - Planning for, coordinating, and implementing activities during long-term closures, including providing meals to eligible students, providing technology for online learning to all students, providing guidance for carrying out requirements under IDEA, and ensuring other educational services can continue to be provided consistent with all Federal, State, and local requirements;
    - Purchasing education technology (including hardware, software, and connectivity) for students who are served by the LEA that aids in regular and substantive educational interaction between students and their classroom instructors, including low-income students and children with disabilities, which may include assistive technology or adaptive equipment;
    - Providing mental health services and supports, including through the implementation of evidence-based full-service community schools;
    - Planning and implementing activities related to summer learning and supplemental after school programs, including providing classroom instruction or online learning during the summer months and addressing the needs of underserved students;

- Addressing learning loss among students, including underserved students, by:
  - Administering and using high-quality assessments that are valid and reliable, to accurately assess students' academic progress and assist educators in meeting students' academic needs, including through differentiated instruction,
  - Implementing evidence-based activities to meet the comprehensive needs of students,
  - Providing information and assistance to parents and families of how they can effectively support students, including in a distance learning environment, and
  - Tracking student attendance and improving student engagement in distance education;

  **Note:** A definition of "underserved students" is provided in the Community Engagement section of the instructions.
- School facility repairs and improvements to enable operation of schools to reduce risks of virus transmission and exposure to environmental health hazards, and to support student health needs;
- Inspection, testing, maintenance, repair, replacement, and upgrade projects to improve the indoor air quality in school facilities, including mechanical and nonmechanical heating, ventilation, and air conditioning systems, filtering, purification and other air cleaning, fans, control systems, and window and door replacement;
- Developing strategies and implementing public health protocols including, to the greatest extent practicable, policies in line with guidance from the Centers for Disease Control and Prevention (CDC) for the reopening and operation of school facilities to effectively maintain the health and safety of students, educators, and other staff;
- Other activities that are necessary to maintain the operation of and continuity of services in LEAs and continuing to employ existing staff of the LEA.

**Other LEA Plans Referenced in this Plan**

In developing the plan, the LEA has flexibility to include community input and/or actions included in other planning documents, such as the Local Control and Accountability Plan (LCAP) and/or the Expanded Learning Opportunities (ELO) Grant Plan, provided that the input and/or actions address the requirements of the ESSER III Expenditure Plan.

An LEA that chooses to utilize community input and/or actions from other planning documents must provide the name of the plan(s) referenced by the LEA and a description of where the plan(s) may be accessed by the public (such as a link to a web page or the street address of where the plan(s) are available) in the table. The LEA may add or delete rows from the table as necessary.

An LEA that chooses not to utilize community input and/or actions from other planning documents may provide a response of "Not Applicable" in the table.

**Summary of Expenditures**

The Summary of Expenditures table provides an overview of the ESSER III funding received by the LEA and how the LEA plans to use its ESSER III funds to support the strategies and interventions being implemented by the LEA.

**Instructions**

For the ‘Total ESSER III funds received by the LEA,’ provide the total amount of ESSER III funds received by the LEA.

In the Total Planned ESSER III Expenditures column of the table, provide the amount of ESSER III funds being used to implement the actions identified in the applicable plan sections.

For the ‘Total ESSER III funds included in this plan,’ provide the total amount of ESSER III funds being used to implement actions in the plan.

**Community Engagement**

**Purpose and Requirements**

An LEA’s decisions about how to use its ESSER III funds will directly impact the students, families, and the local community, and thus the LEA’s plan must be tailored to the specific needs faced by students and schools. These community members will have significant insight into what prevention and mitigation strategies should be pursued to keep students and staff safe, as well as how the various COVID–19 prevention and mitigation strategies impact teaching, learning, and day-to-day school experiences.

An LEA must engage in meaningful consultation with the following community members, as applicable to the LEA:

- Students;
- Families, including families that speak languages other than English;
- School and district administrators, including special education administrators;
- Teachers, principals, school leaders, other educators, school staff, and local bargaining units, as applicable.

“Meaningful consultation” with the community includes considering the perspectives and insights of each of the required community members in identifying the unique needs of the LEA, especially related to the effects of the COVID-19 pandemic. Comprehensive strategic planning will utilize these perspectives and insights to determine the most effective strategies and interventions to address these needs through the programs and services the LEA implements with its ESSER III funds.

Additionally, an LEA must engage in meaningful consultation with the following groups to the extent that they are present or served in the LEA:

- Tribes;
- Civil rights organizations, including disability rights organizations (e.g. the American Association of People with Disabilities, the American Civil Liberties Union, National Association for the Advancement of Colored People, etc.); and
- Individuals or advocates representing the interests of children with disabilities, English learners, homeless students, foster youth, migratory students, children who are incarcerated, and other underserved students.
    - For purposes of this requirement “underserved students” include:
        - Students who are low-income;

- Students who are English learners;
- Students of color;
- Students who are foster youth;
- Homeless students;
- Students with disabilities; and
- Migratory students.

LEAs are also encouraged to engage with community partners, expanded learning providers, and other community organizations in developing the plan.

Information and resources that support effective community engagement may be found under *Resources* on the following web page of the CDE's website: https://www.cde.ca.gov/re/lc.

**Instructions**

In responding to the following prompts, the LEA may reference or include input provided by community members during the development of existing plans, including the LCAP and/or the ELO Grant Plan, to the extent that the input is applicable to the requirements of the ESSER III Expenditure Plan. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broad understanding among the LEA's local community.

**A description of the efforts made by the LEA to meaningfully consult with its required community members and the opportunities provided by the LEA for public input in the development of the plan.**

A sufficient response to this prompt will describe how the LEA sought to meaningfully consult with its required community members in the development of the plan, how the LEA promoted the opportunities for community engagement, and the opportunities that the LEA provided for input from the public at large into the development of the plan.

As noted above, a description of "meaningful consultation" with the community will include an explanation of how the LEA has considered the perspectives and insights of each of the required community members in identifying the unique needs of the LEA, especially related to the effects of the COVID-19 pandemic.

**A description of the how the development of the plan was influenced by community input.**

A sufficient response to this prompt will provide clear, specific information about how input from community members and the public at large was considered in the development of the LEA's plan for its use of ESSER III funds. This response must describe aspects of the ESSER III Expenditure Plan that were influenced by or developed in response to input from community members.

- For the purposes of this prompt, "aspects" may include:
    - Prevention and mitigation strategies to continuously and safely operate schools for in-person learning;

- Strategies to address the academic impact of lost instructional time through implementation of evidence-based interventions (e.g. summer learning or summer enrichment, extended day, comprehensive afterschool programs, or extended school year programs);
- Any other strategies or activities implemented with the LEA's ESSER III fund apportionment consistent with section 2001(e)(2) of the ARP Act; and
- Progress monitoring to ensure interventions address the academic, social, emotional, and mental health needs for all students, especially those students disproportionately impacted by COVID-19

For additional information and guidance, please see the U.S. Department of Education's Roadmap to Reopening Safely and Meeting All Students' Needs Document, available here: https://www2.ed.gov/documents/coronavirus/reopening-2.pdf.

**Planned Actions and Expenditures**

**Purpose and Requirements**

As noted in the Introduction, an LEA receiving ESSER III funds is required to develop a plan to use its ESSER III funds to, at a minimum, address students' academic, social, emotional, and mental health needs, as well as the opportunity gaps that existed before, and were exacerbated by, the COVID-19 pandemic.

**Instructions**

An LEA has the flexibility to include actions described in existing plans, including the LCAP and/or ELO Grant Plan, to the extent that the action(s) address the requirements of the ESSER III Expenditure Plan. When including action(s) from other plans, the LEA must describe how the action(s) included in the ESSER III Expenditure Plan supplement the work described in the plan being referenced. The LEA must specify the amount of ESSER III funds that it intends to use to implement the action(s); these ESSER III funds must be in addition to any funding for those action(s) already included in the plan(s) referenced by the LEA. Descriptions of actions provided should include sufficient detail yet be sufficiently succinct to promote a broad understanding among the LEA's local community.

**Strategies for Continuous and Safe In-Person Learning**

Provide the total amount of funds being used to implement actions related to Continuous and Safe In-Person Learning, then complete the table as follows:

- If the action(s) are included in another plan, identify the plan and provide the applicable goal and/or action number from the plan. If the action(s) are not included in another plan, write "N/A".
- Provide a short title for the action(s).
- Provide a description of the action(s) the LEA will implement using ESSER III funds for prevention and mitigation strategies that are, to the greatest extent practicable, in line with the most recent CDC guidance, in order to continuously and safely operate schools for in-person learning.

- Specify the amount of ESSER III funds the LEA plans to expend to implement the action(s); these ESSER III funds must be in addition to any funding for those action(s) already included in the plan(s) referenced by the LEA.

### Addressing the Impact of Lost Instructional Time

As a reminder, the LEA must use not less than 20 percent of its ESSER III funds to address the academic impact of lost instructional time. Provide the total amount of funds being used to implement actions related to addressing the impact of lost instructional time, then complete the table as follows:

- If the action(s) are included in another plan, identify the plan and provide the applicable goal and/or action number from the plan. If the action(s) are not included in another plan, write “N/A”.
- Provide a short title for the action(s).
- Provide a description of the action(s) the LEA will implement using ESSER III funds to address the academic impact of lost instructional time through the implementation of evidence-based interventions, such as summer learning or summer enrichment, extended day, comprehensive afterschool programs, or extended school year programs.
- Specify the amount of ESSER III funds the LEA plans to expend to implement the action(s); these ESSER III funds must be in addition to any funding for those action(s) already included in the plan(s) referenced by the LEA.

### Use of Any Remaining Funds

After completing the Strategies for Continuous and Safe In-Person Learning and the Addressing the Impact of Lost Instructional Time portions of the plan, the LEA may use any remaining ESSER III funds to implement additional actions to address students’ academic, social, emotional, and mental health needs, as well as to address opportunity gaps, consistent with the allowable uses identified above in the Fiscal Requirements section of the Instructions. LEAs choosing to use ESSER III funds in this manner must provide the total amount of funds being used to implement actions with any remaining ESSER III funds, then complete the table as follows:

- If the action(s) are included in another plan, identify the plan and provide the applicable goal and/or action number from the plan. If the action(s) are not included in another plan, write “N/A”.
- Provide a short title for the action(s).
- Provide a description of any additional action(s) the LEA will implement to address students’ academic, social, emotional, and mental health needs, as well as to address opportunity gaps, consistent with the allowable uses identified above in the Fiscal Requirements section of the Instructions. If an LEA has allocated its entire apportionment of ESSER III funds to strategies for continuous and safe in-person learning and/or to addressing the impact of lost instructional time, the LEA may indicate that it is not implementing additional actions.
- Specify the amount of ESSER III funds the LEA plans to expend to implement the action(s); these ESSER III funds must be in addition to any funding for those action(s) already included in the plan(s) referenced by the LEA. If the LEA it is not implementing additional actions the LEA must indicate “$0”.

### Ensuring Interventions are Addressing Student Needs

The LEA is required to ensure its interventions will respond to the academic, social, emotional, and mental health needs of all students, and particularly those students most impacted by the COVID–19 pandemic, including students from low-income families, students of color, English learners, children with disabilities, students experiencing homelessness, children in foster care, and migratory students.

The LEA may group actions together based on how the LEA plans to monitor the actions' progress. For example, if an LEA plans to monitor the progress of two actions in the same way and with the same frequency, the LEA may list both actions within the same row of the table. Each action included in the ESSER III Expenditure Plan must be addressed within the table, either individually or as part of a group of actions.

Complete the table as follows:

- Provide the action title(s) of the actions being measured.
- Provide a description of how the LEA will monitor progress of the action(s) to ensure that they are addressing the needs of students.
- Specify how frequently progress will be monitored (e.g. daily, weekly, monthly, every 6 weeks, etc.).

California Department of Education
June 2021

SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Location:
***This meeting will be held online at*:**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,,,0#,,150836# US (San Jose)
+13462487799,,5245217471#,,,,,,0#,,150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington D.C)
Passcode: 150836

Date/Time: **Thursday, September 16, 2021 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA** (6:05)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, August 19, 2021.

**B.2 Contract Approval** Consider approval of a contract for a Cooking Instructor.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6.25)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**

**E.3 Action/Discussion Items** (6:45)

**E.3.1 Election of Officers** (6:50)

The Board will elect officers.
**ACTION REQUESTED:** Elect officers.

**E.3.2 ESSER III Expenditure Plan** (7:00)

The Board will be asked to adopt the ESSER III Expenditure Plan.
**ACTION REQUESTED**: Adopt plan.

**E.4 Board Governance** (7:10)

**E.4.1 Remarks from the Chair**

**E.4.2 Discussion of Recording** *The Delicate Dance of Working With a Board of Trustees*

**ACTION REQUESTED**: Discuss recording.

**E.4.3 Committees**

The Board will be asked to appoint Directors to the required committees.
**ACTION REQUESTED:** Appoint committee members.

**E.4.4 Independent Study Policy Updates**

The Board will be asked to adopt an updated version of the Independent Study Policy and Master Agreement.
**ACTION REQUESTED:** Adopt updated policy.

**F. FUTURE AGENDA ITEMS**

The Board will be asked to approve a Prop 39 Facilities Request for the 2022-2023 school year.

The Board will be asked to approve a school calendar for the 2022-2023 school year.

**G. ADJOURNMENT** (7:30)

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# SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Location:

***This meeting will be held online at*:**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,,,0#,,150836# US (San Jose)
+13462487799,,5245217471#,,,,,,0#,,150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington D.C)
Passcode: 150836

Date/Time: **Thursday, August 19, 2021 – 6:00 p.m.**

**Minutes**

**A. CALL TO ORDER**

**A.1 Roll Call** Russell Shapiro, Beth Hammer

*Meeting called to order by Russell Shapiro at 6:00p.m, Beth Hammer and Russell Shapiro present*

**B. APPOINTMENT OF DIRECTORS**

The Board will consider appointment of new directors to open seats on the Board

*Dan LaBar, Robyn Howley and Karey Cooper were unanimously approved to fill open seats on the Board*

**C. CONSENT AGENDA**

**C.1 Minutes Approval** Consider approval of minutes from Special Meeting, August 2, 2021 and Regular Meeting, June 17, 2021.

**C.2 Employee Handbook Approval** Consider approval of the 2021-2022 Employee Handbook.

**C.3 MOU with Blue Oak for School Psychologist Services** Consider approval of a revised

contract for School Psychologist services with Blue Oak for the 2021-2022 school year.

**C.4 Policy for the Education of Children Who are Homeless**
The Board will consider adopting a Policy for the Education of Children Who are Homeless.

**C.5 Consolidated Application**
The Board will be asked to approve the Consolidated Application for categorical Programs.

*Consent Agenda items presented by Michelle Yezbick, discussion followed. Beth Hammer motioned for approval, Russell seconded with unanimous approval.*

**D. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA**

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**E. NOTICED PUBLIC HEARINGS**

**None**

**F. REGULAR BUSINESS**

**F.1 Items Removed from Consent (If any)**

**F.2 Reports and Communications**
*This time will be for Board members to ask questions regarding the provided written materials.*

**F.2.1 School Director Report**
**F.2.2 Treasurer Report**

*Michelle Yezbick presented the Directors report, Pat Casey presented Treasure report. Discussion followed.*

**F.3 Election of Officers**
The Board will elect officers.
**ACTION REQUESTED:** Elect officers.

*This item will be moved to a future Board meeting/Board retreat*

**F.4 Independent Study Program**
The Board will consider an Independent Study Program.
**ACTION REQUESTED:** Approve implementation of an Independent Study Program.

*The Independent Study Program was presented by Russell Shapiro and Michelle Yezbick,*

*However as state legislation has not clarified independent study guidelines, this topic will be revisited by the Board at a future meeting should state clarification be provided.*

**F.5 ESSER III Expenditure Plan**

The Board will be asked to discuss the ESSER III Expenditure Plan.

**ACTION REQUESTED**: Discuss plan.

*The ESSER III Expenditure plan was presented by Michelle Yezbick, Discussion followed.*

**G. FUTURE AGENDA ITEMS**

The Board will welcome newly elected members and elect officers.

The Board will engage in retreat planning and establish a Board calendar.

**H. ADJOURNMENT**

*The meeting was adjourned at 7:01p.m.*

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# SHERWOOD MONTESSORI

**AGREEMENT FOR SERVICES:**
This AGREEMENT is made this 13th day of August, **2021** between **Richard Hirshen** ("Independent Contractor"), and Sherwood Montessori ("Client") a 501 c(3)Public Benefit Corporation located at 1010 Cleveland Avenue, Chico, CA 95928.

**Term of Agreement**
1. This Agreement will become effective August 16, **2021** and will continue in effect until **June 2, 2022** unless terminated sooner.

**Services**
2. As Cooking Instructor, Independent Contractor agrees to perform services for Client as described:

Provide cooking experiences for Sherwood Montessori students K-8 on an agreed upon schedule under the terms and conditions set forth in this Agreement,

**Service Fees**
3. **$ 35/hour** fee for the services specified in Paragraph 2, above, will be paid per invoice presented by the end of each school month.

**Termination on Notice** 4. Either party may terminate this agreement at any time by giving two weeks' written notice to the other party. In the event that this agreement is terminated, Client agrees to compensate Independent Contractor at a prorata rate for any service performed but not billed as of the termination date.

**Arbitration**
5. Any controversy between the parties to this Agreement involving the construction or application of any of its terms, covenants, or conditions will be submitted to arbitration, on the written request of one party served on the other. The arbitration will comply with and be governed by the provisions of the California Arbitration Act, California Code of Civil Procedure Sections 1280 to 1294.2.

**Attorneys' Fees**
6. If any party to this Agreement resorts to litigation or arbitration to enforce or interpret any provision of the Agreement, the prevailing party will be entitled to recover reasonable attorney's fees in addition to any other relief to which that party may be entitled. This provision applies to the entire contract.

**Client's Cooperation**
7. Client agrees to cooperate fully and completely with Independent Contractor and to provide Independent Contractor with all the necessary data, information, records, and other materials requested by Independent Contractor that are reasonably necessary to enable Independent Contractor to render services to Client under the terms of this Agreement.

**Entire Agreement**
8. This Agreement contains the entire agreement between the parties relating to the rights granted and the obligations assumed. Any oral representations or modifications concerning this Agreement will be of no force or effect excepting a subsequent modification in writing, signed by the party to be charged.

**Partial Invalidity**
9. If any part of this contract is declared invalid for any reason, the remainder of the agreement shall be unaffected. The other parts of the agreement shall remain in effect as if the agreement had been executed without the invalid part. The parties declare that they intend and desire that the remaining parts of the agreement continue to be effective without any part or parts that have been declared invalid.

**Governing Law**
10. The validity of this Agreement and its terms or provisions, as well as the rights and duties of the parties, will be interpreted and construed pursuant to and in accordance with the laws of the State of California.

**Amendments and Waivers**
11. Any term or provision of this Agreement may be amended and the observance of any term of this Agreement may be waived (either generally or in a particular instance and either retroactively or prospectively) only by a writing signed by the party to be bound thereby. The waiver by a party of any breach of this Agreement will not be deemed to constitute a waiver of any other default or succeeding breach or default.

**Notices**
12. Any notices to be given under this Agreement by either party to the other may be effected either by personal delivery in writing or by mail, registered or certified, postage prepaid with return receipt requested. Mailed notices must be addressed to the addresses of the parties as they appear in the introductory paragraph of this agreement, but each party may change address by written notice in

accordance with this paragraph. Notices delivered personally will be deemed communicated as of actual receipt; mailed notices will be communicated as of five business days after mailing.

**COVID-19 Health Mandates**

13. Contractor agrees to follow local health guidance (Butte County and California Public Health Department) regarding safety protocols for preventing the spread of COVID-19, including wearing facial coverings while in the presence of students on campus or during school activities.

**Authority**

14. Each party represents that they are fully authorized to execute this agreement and bind their representative agency. Executed on August 13, 2021 Chico, California.

Independent Contractor

Client Representative

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Instructional Staff Report**

**Date:** September 16, 2021

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***Instructional Staff was asked to respond to the questions:*** *1. How has it been transitioning back to a full day of instruction? and 2. What would you like the new Board of Directors to know?*

**Transitional Kindergarten/Kindergarten -Teresa Shippen**

The start to this school year has been smooth and easy for our kindergarten. This is in great part, and with many thanks to the families that send their kids prepared for a full day of learning. In our room we are having a more academic morning routine, with a quiet rest or journal time in the afternoon. Some kids have actually napped, and many enjoy just resting for 15-20 minutes during this quiet time. This is followed by a group lesson in music, science, art or Social-Emotional curriculum. This makes for a peaceful and enjoyable end to our busy day. The kids then transition into extended day or head home.

I have noticed a few things about returning full day. The longer day means we don't have to feel so rushed to squeeze in all of the curriculum. The gift of time helps to set a manageable pace in our classroom. The students returning seem to enjoy the longer day, and time with friends. They are also eager learners, who are ready and excited for lessons. Many of the students did not have a preschool experience but have adapted well to the schedule and routine of the classroom.
The biggest challenge has been that Loretta and I do not have very much collaboration time. That was a truly valuable and much needed time that was available to us as we could work together in the afternoons to prepare materials and lessons. We are missing the time to discuss important things like the goals we set for the students, and monitoring progress. When we had time to share our observations, we were able to work more smoothly as a team. We will now squeeze these discussions and other classroom prep into the times our students are in P.E. I am grateful, however that we are not trying to teach students on line and in person, and I am especially grateful that my time on zoom is limited to classes I am taking to improve my own teaching practice! Overall, I am very happy teaching a classroom full of students for the full day!

This summer I had the pleasure of taking two classes to renew my skills in preparation for the return of students. The first class was a refresher course on the Grace and Courtesy curriculum that we present in a Montessori Classroom. We have spent a good part of the first two weeks

instilling these lessons and will continue these lessons throughout the year. This curriculum covers everything from developing community awareness and skills, how to progress towards independence, physical movement in the classroom and developing kind language in students in a classroom setting. These foundational skills are taught every year, but are especially important in this unique year where many are experiencing school for the first time.

The second class I am taking is titled "Montessori Reading Remediation Pathway". This class will help students who are "behind" in their reading and phonics skills in kindergarten. It is crazy to think that students can be behind already, but the norm is that a student should know 22 letter sounds (phonics) upon entering Kindergarten. Very few students arrive with this skill set, so I am piloting this program to see if it will get our students on the right track for first grade reading. I am enjoying the program as it specifically geared for a Montessori classroom, using Montessori materials and ideology.

Lastly, I want to welcome our new board members and thank our continuing board members for your dedication to our school! We wouldn't have this wonderful school if we did not have committed and valued board members, so thank you all for being willing to step up to this duty. I appreciate your time and support and am optimistically looking forward to a great 2021-2022 school year!

**1st/2nd -Kim Powers**

First, I'd like to thank you for joining our board and helping lead our wonderful school. From the things I've heard, we have had some amazing people offer to give their time to us and the children here, and I really appreciate that. I'd like the new board to know that I'm so glad to be here at Sherwood. This is my second year teaching here, moving from a TK/K class to a 1st/2nd grade class. The start to this school year, in many ways, has been like another first year of teaching. There have been many policies and procedures that are new to me this year due to in-person learning, both as a parent and as a teacher. I'm excited to be teaching and learning in-person and have enjoyed attending in-person staff meetings. Compared to last year, it feels like there is so much going on, which makes the pace of the days and weeks feel super fast. I think this is also partly due to trading out 3 hours every day for teaching that used to go toward prep, planning and collaboration with my aide. There is never enough time to get everything done.

Transitioning back to a full day of school has been many things – exciting, motivating, long, tiring, stressful. At this point, we're four weeks in, and several days out of the week still feel like the work period will never end. The days feel so long compared to last year, but it is starting to become more routine. I am looking forward to the time when everyone is capable of maintaining their stamina for appropriate work for the entire work period, and then being able to get back into it again for a short period after lunch. I love the long mornings because I know that I will be able to work with all of my small groups and get in some really strong instruction. It's not as rushed as it felt last year. I feel optimistic about all the possible things that could be accomplished during the school day, but then there is disappointment in not having enough time in the end to get ready for it all. One aspect of the school day that I have really been enjoying is the afternoon enrichment days. I've had such a great time getting to work with

other students in a different context. We been having lots of fun learning about some basics of fine art making.

**1st/2nd/3rd -Marlo Knox**

It is my pleasure to share my reflections, observations, and opinions with the board around two specific questions:

How has it been transitioning back to a full day of instruction?

What would you like the new Board of Directors to know?

In regards to the first question, it has been a pleasant, even enjoyable, challenge returning to a full day of instruction. Why, you may ask? Being in community and learning in the presence of children brings me back to who I am and what I do. Right away, I noticed that when 20 children, ages six to nine - and multiple adults - are sharing one room we need many skills. Everyone is motivated to acquire those skills so that we can engage with the environment, relate to one another, realize ourselves, live out our dreams, and do life well. We are recovering from a year and a half of emergency procedures and practices. Our shared goal is to reach our Sherwood "normal". We are seeking our rhythm and we are finding it. I've taken an inventory of my teaching life and distilled it to the most important element, which is to partner with the people in my care and guide them in their work of becoming.

Considering the second question, I'd like the Board of Directors to know how grateful I am for your service. I'd like you to know the honor I hold for my position and for everyone else serving the children at our school. In this new season I am clinging to the vision our director has for our school. What she sees as steps, practices, for her classroom leaders, or teachers, are the steps I will take above and before all else. For example, Michelle Yezbick challenged us to be diligent in delivering the Montessori Great Lessons according to a specific timeline. I met the time table she set and have been rewarded for it. A foundation has been set for my instruction in a way I have not experienced before. The same can be said about her vision for enrichment for all our students delivered by classroom teachers rather than specialists. In my enrichment class I am sharing something I am passionate about, the Spanish language and the people that use it. At the same time I am creating meaningful relationships with students in other classrooms. My professional life feels richer for the work of delivering enrichment classes. It is challenging but uplifting. Other things will be laid down to do it but I believe it is worth it.

Alas, there is so much more to type, or explain, but my children call. My responsibilities, my heart, lies with them. This is the best I can do with this work for now. I hope it aids you in your meaningful work.

**1st/2nd /3rd -Anne Adams**

Dear SMCS Board of Directors,

Let's begin the same way my classroom begins lunch: with gratitude.
I'm immensely, intensely grateful to have joined the Sherwood team this year. I'm grateful for a classroom full of vibrant young personalities, for a visionary school director, for a wise and warm-hearted classroom assistant, and for access to well-maintained Montessori materials that help us learn.

I transitioned from supporting distance learning at Sherwood to giving full-day in-person instruction over Summer School, during which I worked all day every day. That was a challenging gig; however, it gave me a clear idea of what I needed to prepare for the school year. Once summer school ended, I spent a lot of time reorganizing the classroom and planning lessons with the overall goals of anticipating students' needs, allowing for both independence and accountability, and removing obstacles to learning. Now, I feel more or less set up for success.

Increased computer time over the past two years has, it seems, had a major impact on students' social habits, coordination, and concentration. Hence, along with our academic work, we prioritize grace and courtesy, gratitude, handcraft, and careful movement. We also sing songs together, which cultivates a positive classroom culture and incentivizes reading and memorization.

I still have plenty of processes to refine in my teaching craft, and I'm being mentored this year for TIPS by Teresa--yet I feel very positive about the start of the school year, and optimistic about our classroom's potential for joy and success.

Thank you,
Anne

**4th /5th/6th -Sheng Vang**

Transitioning back to a full day of instruction has been an adventure. We (students and I) are relearning what it looks like, feels like, and sounds like when we are all gathered together in our class community to learn again. Getting through the day has been difficult for some students, so breaking the day into smaller chunks has helped students who are a little overwhelmed with the amount of time at school. We are constantly reminding students to wear their masks appropriately, especially after lunch recess. However, the day is less choppy because no one is waiting online to get instructions. From students, I feel that there is a bigger appreciation for school. Finally this week, I saw an almost NORMAL work time, which was great to see.

Sherwood is such a wonderful place to grow at your own pace, but the test at the end of the school year always shadows the pace and speed of instruction to make sure that I cover everything that I need to with my students. But it feels good to be here and watch students grow throughout their upper elementary years with me.

**4th /5th /6th-April Pearce**

It has been a challenge transitioning back to the full school year and it feels great to have the full day with my students. This year I have the time to give lessons and watch students work, whereas last year I had time for one or the other. We are getting more lessons, socializing, and community building time with the full days and week. Physically, I am building up my stamina because a lot of my work last year was seated. It feels better for me to be working more on my feet, and my stamina builds with each passing day.

I would like the new board to know that, in many ways, this has felt like another first year of teaching with extra work, decision overload, and foiled plans. We are all adjusting to the transition back, where rules are different than they were last year or the year before that. For example, we still wear masks, but this year students are allowed to be near each other (a great relief for me as a teacher). This means I no longer have to walk around with a yardstick making sure kids were far enough apart, but it does mean our work is interrupted for mask breaks, which provides opportunities for off-task socializing and is one more thing adults have to monitor.

The biggest disappointment so far this year has been with field trips. We have all been stuck near our homes and now that school is back, it feels great to be out and we want to be out in the world. Going out in the community is a foundational part of the Montessori upper grades. Field trips are limited right now because of Covid-19. Many places are offering something virtual, but these older kids want to get out and see the world. Fortunately, I found an art museum we can visit at the end of the month and have a few outdoor ideas. I know there are opportunities for us out there, it's just going to take more work than a normal year to find them. Also, Sheng and I were extremely excited for a camping trip in Lassen National Park, which also took a grant writing and who knows how much work from Sherwood administration. We had to cancel because of the Dixie Fire.

This brings me to the last thing I would like the board to know about our community, there is a lot of collective and individual trauma from the Camp Fire. It was truly life changing. Covid-19 hit the world the next year. The last few years have been extra hard on many of our families. Thankfully, kids are resilient, and they are (mostly) happy to be around each other. I do not enjoy the ever-changing circumstances, but I do (mostly) enjoy the cognitive challenge of finding ways to adapt to the changes.

**7th/8th-Jessi Lusardi**

Getting back into a full day of instruction has been great. I am able to teach full lessons, rather than mini-lessons. I am able to integrate social emotional learning into different subjects. I am able to integrate concepts like media literacy and show connections between each subject. I have had to give students lots of breaks, because they are not used to full days of instruction, which is fine. I think the schedule we have is sustainable for teachers and students, there are breaks built in, and we have the ability to be flexible when needed. I am enjoying the rotation schedule on Tuesday/Wednesday--it's been fun to get to know new students and do something

entirely different with a different age group.

I think that the board of directors needs to know that this year feels like a fresh start for middle school. Michael and I have implemented some behavior and academic policies that we feel have (so far) changed the classroom culture for the better. We had zero parents show up to back to school night, both in-person and on zoom, and it was disappointing. But I am hoping that as volunteer opportunities come up, parents will find a way to be involved that works for them.

We have quality academics in the middle school program, but we also have some really unique opportunities for students. Chef Richie is here on Thursdays, teaching not only a love of food and cooking, but also some technical skills. We have a huge garden to plan together, and Michael and I are integrating different ways for students to be High School ready into our curriculums. I am looking forward to helping to build this program and watching it grow.

**Learning Center/MTSS (Multi-Tiered System of Support)-Molly Makel**

Overall, the transition back to a full day has been successful. However, the special education department has observed that some IEP students are having a harder time adjusting to a longer day of in person instruction. We are implementing positive reinforcement systems for students who struggle with certain tasks.

The special education department has hired four new aides. We have three students who have 1:1 aides and one learning center aide. We have been rearranging aide schedules to ensure that a) all our students have the coverage they need throughout the day b) the aides take their 15 minute break, and c) the match between the student and the aide is ideal. Each aide is working no more than 29.75 hours per week.

Sherwood has been working to obtain all of the cognitive and academic standardized tests that we need to use for initial and triennial IEP's. We have purchased some of those tests from Pearson and will borrow some of them from other charters in the area.
We have several new referrals for assessment for special education. Tammy, Happy, and Molly are working together to complete those assessments within the legal timeline. There are also several SST's referrals, which Molly is scheduling with teachers and parents.
Molly and Laura have identified several students with IEP's or students who have been referred for SST's who would benefit from counseling services. Laura is beginning to see those students and is sending home parent consent forms.

**Extended Day-Brenda Brown**

My name is Brenda Brown and I have been a part of our school community for 10 years. First as a parent when my son started kindergarten, then as a teacher's assistant in a Lower El class where I had the privilege to work with and learn from Eric Parish for 6 years. This year my new title is the Before/Aftercare Coordinator and Lead Assistant. I am excited for this new opportunity and immediately had a vision to have our Aftercare room set up with Montessori

materials and freedom of choice, fostering independence and most importantly holding true to our mission statement and core values for our beloved Montessori school.

This year we have a lot of new staff and I'm enjoying planning and providing assistant training and guidance along with lunch/recess procedures. Most recently we had a nurtured heart trainer come and give us 1 of a 3-part series. Nurtured Heart is a philosophy for creating healthy relationships and recognizing that everyone, even those with the most challenging behaviors, has inherent greatness. As educators over the last couple years, we have received multiple trainings on trauma, and we know that through routines and relationships our children and we ourselves can heal.

I have observed that we have lost some time due to trauma and the disconnect of DL and our kids are behind where they should be. Aftercare now includes an hour of tutoring/accelerated learning. We have been doing daily math routines, big buddy reading, sentence writing, phonetic practice and much more. It has been truly wonderful to have kids back on campus full time and I'm excited to be part of their continued academic, social/emotional growth, and the development of the "whole child".



SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** September 16, 2021

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**Administrative**

- Updated enrollment will be reported at the meeting.
- Our new middle school classroom and teaching kitchen are now open! The middle school students are in the planning stage for our gardening program.
- Rotations on Tuesday and Wednesday afternoons has all students receiving special instruction from a teacher other than their own. This is new this year, and the students and teachers are enjoying getting to know everyone and sharing their specialties; some of the teachers mention this in their Instructional Staff report. Special instruction includes art, music, Spanish, and outdoor education/gardening.
- Following this report is a document that illustrates the school's focused major initiatives for this year.
- A list of employees follows:

**Office/Administration**

| | |
|---|---|
| Director | Michelle Yezbick |
| Administrative Assistant | Heather Fisher |
| Office Manager | Vanessa Aripez |
| Support Specialist | Steve Duke |

**Special Education**

| | |
|---|---|
| Director of MTSS | Molly Makel |
| Education Specialist | Happy Yasko |
| School Psychologist | Tammy German |
| Speech and Language Pathologist | Anna Meehan |
| School Nurse | Natalie Wren |
| Occupational Therapist | Jen Moreno |
| Paraprofessional Aide | Elizabeth Gifford |
| Paraprofessional Aide | Joceline Lopez |
| Paraprofessional Aide | Danielle Moncrief |
| Paraprofessional Aide | Jakob Vojnovic |

**General Education**

| | |
|---|---|
| TK/Kindergarten Teacher | Teresa Shippen |
| TK/Kindergarten Aide | Loretta Howard |
| 1st/2nd Teacher | Kim Powers |
| 1st/2nd Aide | Haley Cramer |
| 1st/2nd/3rd Teacher | Anne Adams |
| 1st/2nd/3rd Aide | Caitlin McKinnon |
| 1st/2nd/3rd Teacher | Marlo Knox |
| 1st/2nd/3rd Aide | Joy Duggan |
| 4th/5th/6th Teacher | April Pearce |
| 4th/5th/6th Aide | Dellanira Carillo |
| 4th/5th/6th Teacher | Sheng Vang |
| 4th/5th/6th Aide | Dustin Murgia |
| 7th/8th Teacher | Jessi Lusardi |
| 7th/8th Teacher | Michael Whittemore |

**Specialists**

| | |
|---|---|
| Physical Education | Kimberly Fellner |
| Counselor | Laura Swanson |

**Extended Day-Child Care**

| | |
|---|---|
| Coordinator | Brenda Brown |
| Aide | Juliette Madsen |
| Aide | Acacia Fellner |
| Aide | Shawna Dorn |

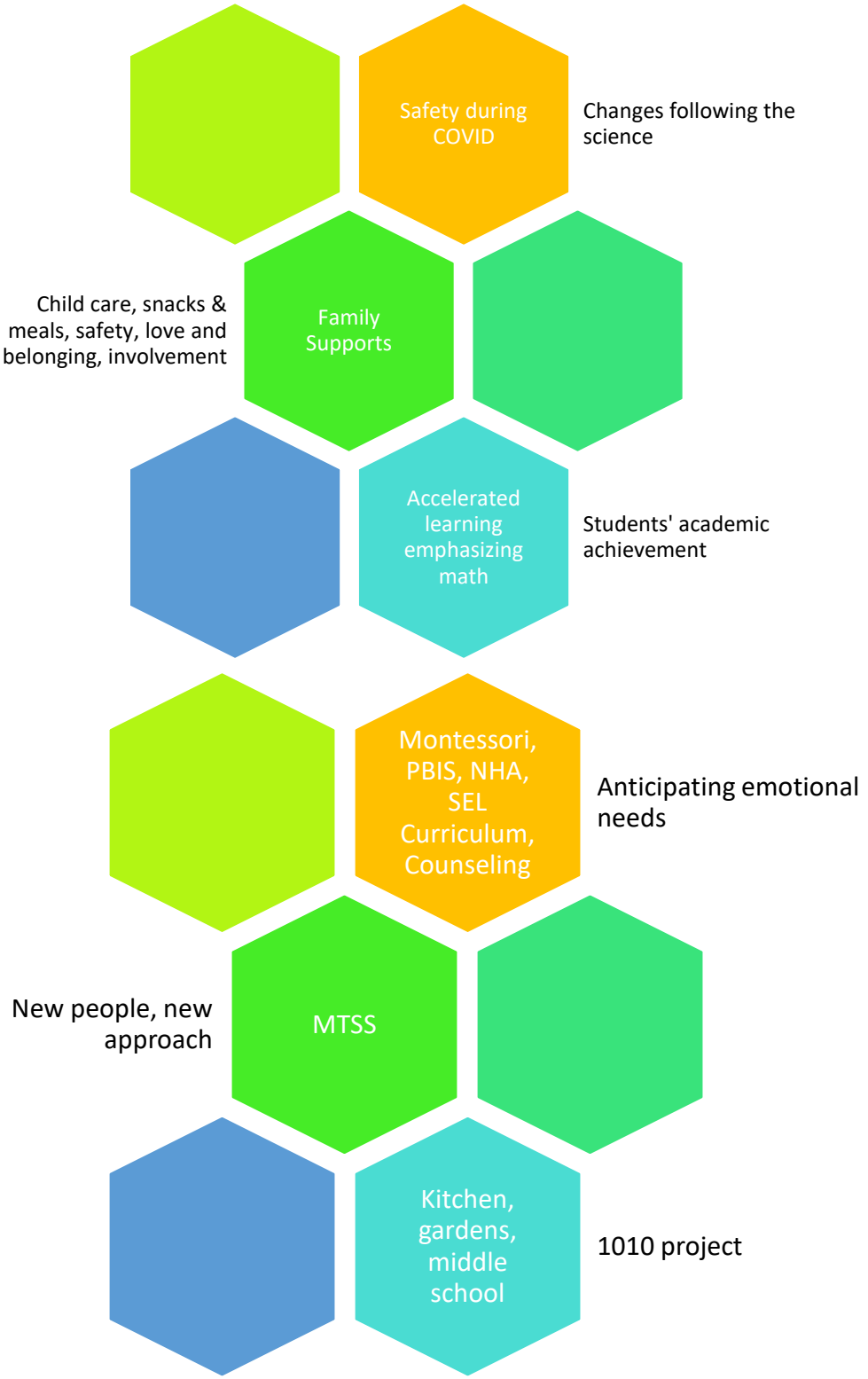
## Safety

- We have been administering COVID rapid tests for students, family members of students, and staff. By identifying individuals who have tested positive, we've been able to avoid any school transmission of the virus thus far.

## Legislative

- The Legislature is still in session as I write this regarding some bills that will impact charter schools. I will update the Board at the meeting on the outcomes.

# 2021-2022 Sherwood Montessori School Initiatives



SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Treasurer's Report**

**Date:** September 16, 2021

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of August 2021 reconciled with, or matched, those of the school's internal reports. The ending cash balance totaled $ 688,633.71 as of August 31, 2021 for the checking account and $50,000 in the special account to assure the contract work at 1010 Cleveland was completed and signed off by the county. It is now complete so the funds can be returned to the checking account.
- There were no unusual high-cost expenses in August.

Profit & Loss

- Deferral payments on Local Control Funds of $171,850 for Feb-May 2021 were received and deposited the first week of September. The August Profit & Loss report shows a Net Income of -$93,272 which is offset by deposits in the first week of September of 2021-22 LCF of $34,220, ESSER funds of $14,547 and $25,174 from the SELPA.

Balance Sheet

- The audit field work has begun and adjustments will be made after all receivables and payables are known.

Cash Flow

- The school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Profit & Loss
### August 2021

| | Aug 21 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 62,993 |
| **Total Income** | 62,993 |
| **Gross Profit** | 62,993 |
| **Expense** | |
| **1000 Certificated Salaries** | 60,180 |
| **2000 Classified Salaries** | 30,494 |
| **3000-Employee Benefits** | 28,457 |
| **4000-Books and Supplies** | 15,741 |
| **5000 Services/Other Op. Exp.** | 21,393 |
| **Total Expense** | 156,265 |
| **Net Ordinary Income** | -93,272 |
| **Net Income** | **-93,272** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Election of Officers**

**Date:** September 16, 2021

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**SUMMARY**

The following officers are required to fulfill our charter: Chair, Vice Chair, Treasurer and Secretary.

**DISCUSSION**

Article 5 of the Bylaws of the Board of Directors describes the action to take when there are vacancies and the duties of the offices:

**SECTION 5. VACANCIES**

Any vacancy caused by the death, resignation, removal, disqualification, or otherwise, of any officer shall be filled by the Board of Directors. In the event of a vacancy in any office other than that of Chair, such vacancy may be filled temporarily by appointment by the Chair until such time as the Board shall fill the vacancy. Vacancies occurring in offices of officers appointed at the discretion of the board may or may not be filled as the board shall determine. An Interim Chair may be appointed by the outgoing Chair in the case where the position of Vice-Chair is vacant, and/or the current Vice-Chair unable to accept the longer term duties of the Chair and /or there are less than four current Directors to fulfill the requirements of a voting quorum. The Interim Chair shall serve in this capacity until the next annual election of the Board of Directors, typically held in May.

**SECTION 6. DUTIES OF CHAIR**

The Chair shall be the Chief Executive Officer of the corporation and shall, subject to the control of the Board of Directors, supervise and control the affairs of the corporation and the activities of the officers. He or she shall perform all duties incident to his or her office and such other duties as may be required by law, by the Articles of Incorporation of this corporation, or by these Bylaws, or which may be prescribed from time to time by the Board of Directors. Unless another person is specifically appointed as Chair of the Board of Directors, he or she shall preside at all meetings of the Board of Directors.

Except as otherwise expressly provided by law, by the Articles of Incorporation, or by these Bylaws, he or she shall, in the name of the corporation, execute such deeds, mortgages, bonds, contracts, checks, or other instruments which may from time to time be authorized by the Board of Directors.

**SECTION 7. DUTIES OF VICE-CHAIR**

In the absence of the Chair, or in the event of his or her inability or refusal to act, the Vice-Chair shall perform all the duties of the Chair, and when so acting shall have all the powers of, and be subject to all the restrictions on, the Chair. The Vice-Chair shall have other powers and perform such other duties as may be prescribed by law, by the Articles of Incorporation, or by these Bylaws, or as may be prescribed by the Board of Directors.

**SECTION 8. DUTIES OF SECRETARY**

The Secretary shall:

1. Certify and keep at the principal office of the corporation the original, or a copy of these Bylaws as amended or otherwise altered to date;

2. Keep at the principal office of the corporation or at such other place as the board may determine, a book of minutes of all meetings of the Board of Directors, and, if applicable, meetings of committees of Directors, recording therein the time and place of holding, whether regular or special, how called, how notice thereof was given, the names of those present or represented at the meeting, and the proceedings thereof;

3. See that all notices are duly given in accordance with the provisions of these Bylaws or as required by law;

4. Be custodian of the records;

5. Exhibit at all reasonable times to any Director of the corporation, or to his or her agent or attorney, on request therefore, the Bylaws, and the minutes of the proceedings of the Directors of the corporation. In general, perform all duties incident to the office of Secretary, and such other duties as may be required by law, by the Articles of Incorporation of this corporation, or by these Bylaws, or which may be assigned to him or her from time to time by the Board of Directors.

**SECTION 9. DUTIES OF TREASURER**

Subject to the provisions of these Bylaws relating to the "Execution of Instruments, Deposits and Funds," the Treasurer shall:

1. Have oversight responsibility for all funds and securities of the corporation, and deposit and/or provide direction to the School Director to deposit all such funds in the name of the corporation in such banks, trust companies, or other depositories as shall be selected by the Board of Directors;

2. Provide review, perspective and advice to the Board with regard to the integrity of financial statements, the validity of financial projections and the viability of the financial condition of the corporation;

3. Prepare, or cause to be prepared, and certify, or cause to be certified, the financial statements to be included in any required reports including the Annual Budget, First and Second Interim Budget Reports, and Final Unaudited Actuals;

4. Provide access at all reasonable times to the books of account and financial records to any Director of the corporation, or to his or her agent or attorney, on request therefore;

5. Perform all duties incident to the office of Treasurer and such other duties as may be required by law, by the Articles of Incorporation of the corporation, or by these Bylaws, or which may be assigned to him or her from time to time by the Board of Directors.

**ACTION REQUESTED**

Elect board officers.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **ESSER III Expenditure Plan**

**Date:** September 16, 2021

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**SUMMARY**

ESSER III funds require a plan be adopted at a Board meeting by September 30th, 2021.

**DISCUSSION**

LEAs that receive Elementary and Secondary School Emergency Relief (ESSER) funds are to create a plan that describes how the funds will be used to facilitate safe, in-person instruction and address learning loss.

A draft of this plan was presented at the August Regular Board Meeting to give stakeholders an opportunity to give input. The plan is based of stakeholder input collected during the 2020-2021 school year and expands on some of the ideas put forward in the LCAP (Local Control Accountability Plan) and ELO (Expanded Learning Opportunities).

**ACTION REQUESTED**

Adopt plan.

# ESSER III Expenditure Plan

| Local Educational Agency (LEA) Name | Contact Name and Title | Email and Phone |
|---|---|---|
| Sherwood Montessori | Michelle Yezbick<br>Director, Sherwood Montessori | michelle@sherwoodmontessori.org<br>(530) 345-6600 |

School districts, county offices of education, or charter schools, collectively known as LEAs, that receive Elementary and Secondary School Emergency Relief (ESSER) funds under the American Rescue Plan Act, referred to as ESSER III funds, are required to develop a plan for how they will use their ESSER III funds. In the plan, an LEA must explain how it intends to use its ESSER III funds to address students' academic, social, emotional, and mental health needs, as well as any opportunity gaps that existed before, and were worsened by, the COVID-19 pandemic. An LEA may also use its ESSER III funds in other ways, as detailed in the Fiscal Requirements section of the Instructions. In developing the plan, the LEA has flexibility to include community input and/or actions included in other planning documents, such as the Local Control and Accountability Plan (LCAP), provided that the input and actions are relevant to the LEA's Plan to support students.

For more information please see the Instructions.

## Other LEA Plans Referenced in this Plan

| Plan Title | Where the Plan May Be Accessed |
|---|---|
| Sherwood Montessori ESSER III Expenditure Plan | This plan describes the actions and funding to complete actions the school will take to offer safe in-person learning, address negative impacts on learning that school closure had, and providing interventions to address student needs. |

## Summary of Planned ESSER III Expenditures

Below is a summary of the ESSER III funds received by the LEA and how the LEA intends to expend these funds in support of students.

| Total ESSER III funds received by the LEA |
|---|
| $196,383 |

| Plan Section | Total Planned ESSER III |
|---|---|
| Strategies for Continuous and Safe In-Person Learning | $10,600 |
| Addressing Lost Instructional Time (a minimum of 20 percent of the LEAs ESSER III funds) | $162,363 |
| Use of Any Remaining Funds | $23,420 |

**Total ESSER III funds included in this plan**

$196,383

## Community Engagement

An LEA's decisions about how to use its ESSER III funds will directly impact the students, families, and the local community. The following is a description of how the LEA meaningfully consulted with its community members in determining the prevention and mitigation strategies, strategies to address the academic impact of lost instructional time, and any other strategies or activities to be implemented by the LEA. In developing the plan, the LEA has flexibility to include input received from community members during the development of other LEA Plans, such as the LCAP, provided that the input is relevant to the development of the LEA's ESSER III Expenditure Plan.

For specific requirements, including a list of the community members that an LEA is required to consult with, please see the Community Engagement section of the Instructions.

A description of the efforts made by the LEA to meaningfully consult with its required community members and the opportunities provided by the LEA for public input in the development of the plan.

Sherwood has used community surveys annually to develop its LCAP and in 2020-2021 the Extended Learning Opportunities Grant Plan. The survey polled all parents, family member, teachers, staff and community members who were asked to evaluate their experiences and give input regarding what they would like to see in terms of school improvement. Student surveys are also given with questions tailored for their experiences. Last year, input was sought for revised questions to capture the experiences of the students and families during distance learning. Focus group members analyzed the data and prepared a presentation for public meetings of the board of directors. A draft of the plan was vetted at the public meetings and the final plan is posted on the school's website.

This Expenditure Plan for the ESSER III funds is also being presented at an open, public meeting of the board of directors with an invitation for attendees to give input. The school calendar includes four Town Hall meetings that will be held via Zoom to give stakeholders more opportunities to share their experiences and hopes for the school's programs to address safe in-person instruction and mitigation of learning loss that occurred during school closure.

A description of how the development of the plan was influenced by community input.

Survey questions asked parents if they would value and take advantage of programs to address learning loss, such as summer school and free tutoring after school. Tracking school expenditures on PPE gave good data that indicated that families wanted and/or needed the school to provide facial masks for students and staff. The safety plan for in-person learning was vetted at public board meetings and at town hall style meetings. The continuously increasing number of parents who chose to include their students in in-person learning beginning in October, 2020 was good data indicating that safety protocols were appreciated and investments in the materials and equipment needed to carry out the plan were sound.

Stakeholders have indicated that the following actions would be valuable to the students, families, faculty and staff of Sherwood Montessori:

- Expanded learning options during the summer prior to the 2021-2022 school year.
- Free child care before and after school, with after school including tutoring for students who attend for the first hour.
- A newly designed and furnished child care environment in which to provide tutoring and child care.
- Healthy snacks and meals provided free of cost.
- Counseling available on site in a new counseling environment.
- A school psychologist available for staff and faculty to consult with regarding student needs.
- PPE provided by the school for students and staff.
- Air purifiers to provide the best possible ventilation.
- A gardening/outdoor education program that includes expanded and beautified garden areas for supporting student and staff mental wellness.
- A Director of MTSS (Multi-Tiered System of Support) to ensure the smooth functioning of an expanded system for intervention.
- Training for staff in multiple strategies and programs to respond to addressing learning loss and mental wellness.
- Purchases of programs and materials to address learning loss and mental wellness.
- Purchase of additional technology as needed to support safe in-person instruction, which may include short-term distance learning for students who are ill or exposed.
- Additional substitute salary and benefits costs to cover staff who need time off to address illness, exposure, or family medical needs.

# Actions and Expenditures to Address Student Needs

The following is the LEA's plan for using its ESSER III funds to meet students' academic, social, emotional, and mental health needs, as well as how the LEA will address the opportunity gaps that existed before, and were exacerbated by, the COVID-19 pandemic. In developing the plan, the LEA has the flexibility to include actions described in existing plans, including the LCAP and/or Expanded Learning Opportunity (ELO) Grant Plan, to the extent that the action(s) address the requirements of the ESSER III Expenditure Plan.

For specific requirements, please refer to the Actions and Expenditures to Address Student Needs section of the Instructions.

## Strategies for Continuous and Safe In-Person Learning

A description of how the LEA will use funds to continuously and safely operate schools for in-person learning in a way that reduces or prevents the spread of the COVID-19 virus.

**Total ESSER III funds being used to implement strategies for continuous and safe in-person learning**

$10,600

| Plan Alignment (if applicable) | Action Title | Action Description | Planned ESSER III Funded Expenditures |
|---|---|---|---|
| IPI 1.A | PPE | PPE will be provided by the school for students and staff | $3,500 |
| IPI 2.A | Ventilation | Air purifiers will be provided to provide the best possible ventilation | $1,500 |
| IPI 3. A | Technology | Purchase of additional technology as needed to support safe in-person instruction | $2,000 |
| IPI 4. A | Substitutes | Additional substitute salary and benefits to cover costs for staff who are ill, isolating after exposure, or absent due to family medical care needs | $3,600 |

## Addressing the Impact of Lost Instructional Time

A description of how the LEA will use funds to address the academic impact of lost instructional time.

**Total ESSER III funds being used to address the academic impact of lost instructional time**

$172,963

| Plan Alignment (if applicable) | Action Title | Action Description | Planned ESSER III Funded Expenditures |
|---|---|---|---|
| LIT 1.A | Tutoring-Child Care | Free child care before and after school, with after school including tutoring for students who attend for the first hour. | $46,482 |

| Plan Alignment (if applicable) | Action Title | Action Description | Planned ESSER III Funded Expenditures |
|---|---|---|---|
| LIT 2.A | Mental Wellness | Counseling available on site in a new counseling environment. | $35,664 |
| LIT 2.B | Mental Wellness | A school psychologist available for staff and faculty to consult with regarding student needs. | $19,946 |
| LIT 2.C | Mental Wellness | A gardening/outdoor education program that includes expanded and beautified garden areas for supporting student and staff mental wellness. | $6,405 |
| LIT 2.D | Mental Wellness | Purchases of programs and materials to address mental wellness. | $2,000 |
| LIT 2.E | Mental Wellness | Training for staff in multiple strategies and programs to address learning loss and mental wellness. | $2,000 |
| LIT 2.F | Mental Wellness | Implementation of PBIS: Positive Behavior Interventions and Support | $2,000 |
| LIT 2.G | Mental Wellness | Training for staff on Anti-Bias Anit-Racist practices in school to ensure inclusion of all students. | $2,000 |
| LIT 3.A | Academic Interventions | A Director of MTSS (Multi-Tiered System of Support) to ensure the smooth functioning of an expanded system for intervention. | $34,148 |
| LIT 3.B | Academic Interventions | Training for staff in multiple strategies and programs to address learning loss. | $2,925 |
| LIT 3.C | Academic Interventions | Purchases of programs and materials to address learning loss. | $3,000 |

## Use of Any Remaining Funds

A description of the how the LEA will use any remaining ESSER III funds, as applicable.

| Total ESSER III funds being used to implement additional actions |
|---|
| $23,420 |

| Plan Alignment (if applicable) | Action Title | Action Description | Planned ESSER III Funded Expenditures |
|---|---|---|---|
| HK 1.A | Healthy Kids Free snacks and meals | School will provide healthy snacks and meals for kids | $2,000 |
| LIT 4.A | Independent Study for Quarantined Students | School may provide IS for quarantined students | $11,420 |
| LIT 4.B | Summer Program | School may provide a summer program | $10,000 |

# Ensuring Interventions are Addressing Student Needs

The LEA is required to ensure its interventions will respond to the academic, social, emotional, and mental health needs of all students, and particularly those students most impacted by the COVID–19 pandemic. The following is the LEA's plan for ensuring that the actions and expenditures in the plan are addressing the identified academic, social, emotional, and mental health needs of its students, and particularly those students most impacted by the COVID–19 pandemic.

| Action Title(s) | How Progress will be Monitored | Frequency of Progress Monitoring |
|---|---|---|
| Multi-Tiered System of Supports | Formal assessment data is collected for all students three times a year for reading, math and writing. For reading, protocols developed by the Columbia Teachers College Reading and Writing Project are used with benchmark texts. The protocols measure accuracy, fluency, and comprehension to identify which level text would be the instructional level and which is an independent level. Sherwood will be using Star Renaissance Assessments for math, as well as another measure for reading and writing.<br><br>For writing, in addition to Star Renaissance Writing Assessment, teachers give a prompt to students at the beginning and end of the year and analyze the writing with rubrics developed from the English Language Arts Common Core | Formal assessment data is collected for all students three times a year for reading and math and two times a year for writing. Students who have been identified for Tier 2 level services/SST will have progress monitored according to the SST plan, usually every 6-8 weeks. |

| Action Title(s) | How Progress will be Monitored | Frequency of Progress Monitoring |
|---|---|---|
| | State Standards by the California Department of Education.<br><br>The Basic Phonics and Spelling Test (BPST) is used with pre-readers and emergent readers and students in grades one through six and up take a spelling inventory assessment to identify in which developmental stage of spelling they are functioning.<br><br>Sherwood has implemented Positive Behavior Interventions and Supports (PBIS) and tracks behavior incidents in the SWIS database (School-Wide Information System). Montessori teachers also use anecdotal notes taken while observing students during the work period as another assessment tool.<br><br>If these data suggests that a student is struggling to reach grade level or behavioral expectations, the classroom teacher will immediately begin to adapt the lessons and curriculum to find the optimal level for instruction. Each modification is recorded, as is each strategy that is attempted. If the student does not respond to these modifications after six to eight weeks, a referral is formally made to the Student Success Team (SST) with the data collected.<br><br>The Student Success Team (SST) is a general education function and is composed of the school director, student‘s teacher, parent and other school personnel, depending on the nature of the referral. The primary function of the SST is to identify, discuss and recommend interventions to address the needs of the student and to support the teacher in meeting | |

| Action Title(s) | How Progress will be Monitored | Frequency of Progress Monitoring |
| --- | --- | --- |
| | these identified needs. Anyone who has a concern for a student may refer the student to the SST for consideration. As the success of every student is a primary pillar of Sherwood Montessori, students who are identified by their teacher as needing extra support or services, whether because of academic troubles, being a high achieving student who needs additional challenges, issues with behavior or emotional issues, or other concerns can be referred to the SST.<br><br>If all appropriate school based interventions have been exhausted, the student may be referred for an assessment for special education services. | |

# ESSER III Expenditure Plan Instructions

## Introduction

School districts, county offices of education (COEs), or charter schools, collectively known as local educational agencies (LEAs), that receive Elementary and Secondary School Emergency Relief (ESSER) funds under the American Rescue Plan (ARP) Act, referred to as ESSER III funds, are required to develop a plan for how they will use ESSER III funds to, at a minimum, address students' academic, social, emotional, and mental health needs, as well as the opportunity gaps that existed before, and were exacerbated by, the COVID-19 pandemic.

The plan must be adopted by the local governing board or body of the LEA at a public meeting on or before October 29, 2021 and must be submitted for review and approval within five days of adoption. A school district must submit its ESSER III Expenditure Plan to its COE for review and approval; a COE must submit its plan to the California Department of Education for review and approval. A charter school must submit its plan to its chartering authority for review and to the COE of the county in which the charter school operates for review and approval.

In addition, consistent with the requirements of the ARP, Volume 86, *Federal Register*, page 21201, April 22, 2021, the ESSER III Expenditure Plan must be:

- Written in an understandable and uniform format;
- Written in a language that parents can understand, to the extent practicable;
    - If it is not practicable to provide written translations to a parent with limited English proficiency, the plan must be orally translated for parents
- Provided in an alternative format to a parent who is an individual with a disability as defined by the Americans with Disabilities Act, upon request; and
- Be made publicly available on the LEA's website.

For additional information regarding ESSER III funding please see the ARP Act Funding web page at https://www.cde.ca.gov/fg/cr/arpact.asp.

*For technical assistance related to the completion of the ESSER III Expenditure Plan, please contact EDReliefFunds@cde.ca.gov.*

## Fiscal Requirements

- The LEA must use at least 20 percent (20%) of its ESSER III apportionment for expenditures related to addressing the academic impact of lost instructional time through the implementation of evidence-based interventions, such as summer learning or summer enrichment, extended day, comprehensive afterschool programs, or extended school year programs.
    - For purposes of this requirement, "evidence-based interventions" include practices or programs that have **evidence** to show that they are effective at producing results and improving outcomes when implemented. This kind of evidence has generally been produced through formal studies and research. There are four tiers, or levels, of evidence:

        - **Tier 1 – Strong Evidence**: the effectiveness of the practices or programs is supported by one or more well-designed and well-implemented randomized control experimental studies.
        - **Tier 2 – Moderate Evidence**: the effectiveness of the practices or programs is supported by one or more well-designed and well-implemented quasi-experimental studies.
        - **Tier 3 – Promising Evidence**: the effectiveness of the practices or programs is supported by one or more well-designed and well-implemented correlational studies (with statistical controls for selection bias).
        - **Tier 4 – Demonstrates a Rationale**: practices that have a well-defined logic model or theory of action, are supported by research, and have some effort underway by a State Educational Agency, LEA, or outside research organization to determine their effectiveness.
    - **For additional information please see the Evidence-Based Interventions Under the ESSA web page at https://www.cde.ca.gov/re/es/evidence.asp.**
- The LEA must use the remaining ESSER III funds consistent with section 2001(e)(2) of the ARP Act, including for:
    - Any activity authorized by the Elementary and Secondary Education Act (ESEA) of 1965;
    - Any activity authorized by the Individuals with Disabilities Education Act (IDEA);
    - Any activity authorized by the Adult Education and Family Literacy Act;
    - Any activity authorized by the Carl D. Perkins Career and Technical Education Act of 2006;
    - Coordination of preparedness and response efforts of LEAs with State, local, Tribal, and territorial public health departments, and other relevant agencies, to improve coordinated responses among such entities to prevent, prepare for, and respond to COVID-19;
    - Activities to address the unique needs of low-income students, students with disabilities, English learners, racial and ethnic minorities, homeless students, and foster youth, including how outreach and service delivery will meet the needs of each population;
    - Developing and implementing procedures and systems to improve the preparedness and response efforts of LEAs;
    - Training and professional development for staff of the LEA on sanitation and minimizing the spread of infectious diseases;
    - Purchasing supplies to sanitize and clean the facilities of an LEA, including buildings operated by such agency;
    - Planning for, coordinating, and implementing activities during long-term closures, including providing meals to eligible students, providing technology for online learning to all students, providing guidance for carrying out requirements under IDEA, and ensuring other educational services can continue to be provided consistent with all Federal, State, and local requirements;
    - Purchasing education technology (including hardware, software, and connectivity) for students who are served by the LEA that aids in regular and substantive educational interaction between students and their classroom instructors, including low-income students and children with disabilities, which may include assistive technology or adaptive equipment;
    - Providing mental health services and supports, including through the implementation of evidence-based full-service community schools;
    - Planning and implementing activities related to summer learning and supplemental after school programs, including providing classroom instruction or online learning during the summer months and addressing the needs of underserved students;

- Addressing learning loss among students, including underserved students, by:
  - Administering and using high-quality assessments that are valid and reliable, to accurately assess students' academic progress and assist educators in meeting students' academic needs, including through differentiated instruction,
  - Implementing evidence-based activities to meet the comprehensive needs of students,
  - Providing information and assistance to parents and families of how they can effectively support students, including in a distance learning environment, and
  - Tracking student attendance and improving student engagement in distance education;

  **Note:** A definition of "underserved students" is provided in the Community Engagement section of the instructions.
- School facility repairs and improvements to enable operation of schools to reduce risks of virus transmission and exposure to environmental health hazards, and to support student health needs;
- Inspection, testing, maintenance, repair, replacement, and upgrade projects to improve the indoor air quality in school facilities, including mechanical and nonmechanical heating, ventilation, and air conditioning systems, filtering, purification and other air cleaning, fans, control systems, and window and door replacement;
- Developing strategies and implementing public health protocols including, to the greatest extent practicable, policies in line with guidance from the Centers for Disease Control and Prevention (CDC) for the reopening and operation of school facilities to effectively maintain the health and safety of students, educators, and other staff;
- Other activities that are necessary to maintain the operation of and continuity of services in LEAs and continuing to employ existing staff of the LEA.

**Other LEA Plans Referenced in this Plan**

In developing the plan, the LEA has flexibility to include community input and/or actions included in other planning documents, such as the Local Control and Accountability Plan (LCAP) and/or the Expanded Learning Opportunities (ELO) Grant Plan, provided that the input and/or actions address the requirements of the ESSER III Expenditure Plan.

An LEA that chooses to utilize community input and/or actions from other planning documents must provide the name of the plan(s) referenced by the LEA and a description of where the plan(s) may be accessed by the public (such as a link to a web page or the street address of where the plan(s) are available) in the table. The LEA may add or delete rows from the table as necessary.

An LEA that chooses not to utilize community input and/or actions from other planning documents may provide a response of "Not Applicable" in the table.

**Summary of Expenditures**

The Summary of Expenditures table provides an overview of the ESSER III funding received by the LEA and how the LEA plans to use its ESSER III funds to support the strategies and interventions being implemented by the LEA.

**Instructions**

For the ‘Total ESSER III funds received by the LEA,’ provide the total amount of ESSER III funds received by the LEA.

In the Total Planned ESSER III Expenditures column of the table, provide the amount of ESSER III funds being used to implement the actions identified in the applicable plan sections.

For the ‘Total ESSER III funds included in this plan,’ provide the total amount of ESSER III funds being used to implement actions in the plan.

**Community Engagement**

**Purpose and Requirements**

An LEA’s decisions about how to use its ESSER III funds will directly impact the students, families, and the local community, and thus the LEA’s plan must be tailored to the specific needs faced by students and schools. These community members will have significant insight into what prevention and mitigation strategies should be pursued to keep students and staff safe, as well as how the various COVID–19 prevention and mitigation strategies impact teaching, learning, and day-to-day school experiences.

An LEA must engage in meaningful consultation with the following community members, as applicable to the LEA:

- Students;
- Families, including families that speak languages other than English;
- School and district administrators, including special education administrators;
- Teachers, principals, school leaders, other educators, school staff, and local bargaining units, as applicable.

“Meaningful consultation” with the community includes considering the perspectives and insights of each of the required community members in identifying the unique needs of the LEA, especially related to the effects of the COVID-19 pandemic. Comprehensive strategic planning will utilize these perspectives and insights to determine the most effective strategies and interventions to address these needs through the programs and services the LEA implements with its ESSER III funds.

Additionally, an LEA must engage in meaningful consultation with the following groups to the extent that they are present or served in the LEA:

- Tribes;
- Civil rights organizations, including disability rights organizations (e.g. the American Association of People with Disabilities, the American Civil Liberties Union, National Association for the Advancement of Colored People, etc.); and
- Individuals or advocates representing the interests of children with disabilities, English learners, homeless students, foster youth, migratory students, children who are incarcerated, and other underserved students.
    - For purposes of this requirement “underserved students” include:
        - Students who are low-income;

- Students who are English learners;
- Students of color;
- Students who are foster youth;
- Homeless students;
- Students with disabilities; and
- Migratory students.

LEAs are also encouraged to engage with community partners, expanded learning providers, and other community organizations in developing the plan.

Information and resources that support effective community engagement may be found under *Resources* on the following web page of the CDE's website: https://www.cde.ca.gov/re/lc.

**Instructions**

In responding to the following prompts, the LEA may reference or include input provided by community members during the development of existing plans, including the LCAP and/or the ELO Grant Plan, to the extent that the input is applicable to the requirements of the ESSER III Expenditure Plan. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broad understanding among the LEA's local community.

**A description of the efforts made by the LEA to meaningfully consult with its required community members and the opportunities provided by the LEA for public input in the development of the plan.**

A sufficient response to this prompt will describe how the LEA sought to meaningfully consult with its required community members in the development of the plan, how the LEA promoted the opportunities for community engagement, and the opportunities that the LEA provided for input from the public at large into the development of the plan.

As noted above, a description of "meaningful consultation" with the community will include an explanation of how the LEA has considered the perspectives and insights of each of the required community members in identifying the unique needs of the LEA, especially related to the effects of the COVID-19 pandemic.

**A description of the how the development of the plan was influenced by community input.**

A sufficient response to this prompt will provide clear, specific information about how input from community members and the public at large was considered in the development of the LEA's plan for its use of ESSER III funds. This response must describe aspects of the ESSER III Expenditure Plan that were influenced by or developed in response to input from community members.

- For the purposes of this prompt, "aspects" may include:
    - Prevention and mitigation strategies to continuously and safely operate schools for in-person learning;

- Strategies to address the academic impact of lost instructional time through implementation of evidence-based interventions (e.g. summer learning or summer enrichment, extended day, comprehensive afterschool programs, or extended school year programs);
- Any other strategies or activities implemented with the LEA's ESSER III fund apportionment consistent with section 2001(e)(2) of the ARP Act; and
- Progress monitoring to ensure interventions address the academic, social, emotional, and mental health needs for all students, especially those students disproportionately impacted by COVID-19

For additional information and guidance, please see the U.S. Department of Education's Roadmap to Reopening Safely and Meeting All Students' Needs Document, available here: https://www2.ed.gov/documents/coronavirus/reopening-2.pdf.

**Planned Actions and Expenditures**

**Purpose and Requirements**

As noted in the Introduction, an LEA receiving ESSER III funds is required to develop a plan to use its ESSER III funds to, at a minimum, address students' academic, social, emotional, and mental health needs, as well as the opportunity gaps that existed before, and were exacerbated by, the COVID-19 pandemic.

**Instructions**

An LEA has the flexibility to include actions described in existing plans, including the LCAP and/or ELO Grant Plan, to the extent that the action(s) address the requirements of the ESSER III Expenditure Plan. When including action(s) from other plans, the LEA must describe how the action(s) included in the ESSER III Expenditure Plan supplement the work described in the plan being referenced. The LEA must specify the amount of ESSER III funds that it intends to use to implement the action(s); these ESSER III funds must be in addition to any funding for those action(s) already included in the plan(s) referenced by the LEA. Descriptions of actions provided should include sufficient detail yet be sufficiently succinct to promote a broad understanding among the LEA's local community.

**Strategies for Continuous and Safe In-Person Learning**

Provide the total amount of funds being used to implement actions related to Continuous and Safe In-Person Learning, then complete the table as follows:

- If the action(s) are included in another plan, identify the plan and provide the applicable goal and/or action number from the plan. If the action(s) are not included in another plan, write "N/A".
- Provide a short title for the action(s).
- Provide a description of the action(s) the LEA will implement using ESSER III funds for prevention and mitigation strategies that are, to the greatest extent practicable, in line with the most recent CDC guidance, in order to continuously and safely operate schools for in-person learning.

- Specify the amount of ESSER III funds the LEA plans to expend to implement the action(s); these ESSER III funds must be in addition to any funding for those action(s) already included in the plan(s) referenced by the LEA.

### Addressing the Impact of Lost Instructional Time

As a reminder, the LEA must use not less than 20 percent of its ESSER III funds to address the academic impact of lost instructional time. Provide the total amount of funds being used to implement actions related to addressing the impact of lost instructional time, then complete the table as follows:

- If the action(s) are included in another plan, identify the plan and provide the applicable goal and/or action number from the plan. If the action(s) are not included in another plan, write “N/A”.
- Provide a short title for the action(s).
- Provide a description of the action(s) the LEA will implement using ESSER III funds to address the academic impact of lost instructional time through the implementation of evidence-based interventions, such as summer learning or summer enrichment, extended day, comprehensive afterschool programs, or extended school year programs.
- Specify the amount of ESSER III funds the LEA plans to expend to implement the action(s); these ESSER III funds must be in addition to any funding for those action(s) already included in the plan(s) referenced by the LEA.

### Use of Any Remaining Funds

After completing the Strategies for Continuous and Safe In-Person Learning and the Addressing the Impact of Lost Instructional Time portions of the plan, the LEA may use any remaining ESSER III funds to implement additional actions to address students’ academic, social, emotional, and mental health needs, as well as to address opportunity gaps, consistent with the allowable uses identified above in the Fiscal Requirements section of the Instructions. LEAs choosing to use ESSER III funds in this manner must provide the total amount of funds being used to implement actions with any remaining ESSER III funds, then complete the table as follows:

- If the action(s) are included in another plan, identify the plan and provide the applicable goal and/or action number from the plan. If the action(s) are not included in another plan, write “N/A”.
- Provide a short title for the action(s).
- Provide a description of any additional action(s) the LEA will implement to address students’ academic, social, emotional, and mental health needs, as well as to address opportunity gaps, consistent with the allowable uses identified above in the Fiscal Requirements section of the Instructions. If an LEA has allocated its entire apportionment of ESSER III funds to strategies for continuous and safe in-person learning and/or to addressing the impact of lost instructional time, the LEA may indicate that it is not implementing additional actions.
- Specify the amount of ESSER III funds the LEA plans to expend to implement the action(s); these ESSER III funds must be in addition to any funding for those action(s) already included in the plan(s) referenced by the LEA. If the LEA it is not implementing additional actions the LEA must indicate “$0”.

### Ensuring Interventions are Addressing Student Needs

The LEA is required to ensure its interventions will respond to the academic, social, emotional, and mental health needs of all students, and particularly those students most impacted by the COVID–19 pandemic, including students from low-income families, students of color, English learners, children with disabilities, students experiencing homelessness, children in foster care, and migratory students.

The LEA may group actions together based on how the LEA plans to monitor the actions' progress. For example, if an LEA plans to monitor the progress of two actions in the same way and with the same frequency, the LEA may list both actions within the same row of the table. Each action included in the ESSER III Expenditure Plan must be addressed within the table, either individually or as part of a group of actions.

Complete the table as follows:

- Provide the action title(s) of the actions being measured.
- Provide a description of how the LEA will monitor progress of the action(s) to ensure that they are addressing the needs of students.
- Specify how frequently progress will be monitored (e.g. daily, weekly, monthly, every 6 weeks, etc.).

California Department of Education
June 2021

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Board Governance: Committees**

**Date:** September 16, 2021

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The Board is asked to appoint members to the required committees for the 2021-2022 school year. The Board may choose to create standing committees and/or ad hoc committees in addition to the following required committees.

## Required Sherwood Board Committees

Committees of the Board shall have a minimum of 2 board members and a maximum of 5 voting members, possibly including representatives from SMPO, the faculty, parents, etc. as either voting or non-voting members.

| **Executive Committee** | |
|---|---|
| **Members:** | Chair, Vice Chair, Secretary, Treasurer |
| **Meeting frequency:** | As needed (as of today, has never met in any years) |
| **Purpose:** | Board has the option to delegate voting authority to the ExCom as needed for decision making, with a list of exceptions, outlined in the Bylaws |
| **Goals:** | Vote on matters assigned by Board. |
| **Charter/ Bylaws:** | BYLAWS, ARTICLE 6, COMMITTEES, SECTION 1. EXECUTIVE COMMITTEE |

| **Elections Committee** (Required, Ad Hoc) | |
|---|---|
| **Members:** | Two Board members, SMPO member |
| **Meeting Frequency:** | Meets typically two to three times annually, around Board elections time in the spring. |
| **Purpose:** | ● Recruit candidates, announce upcoming election, accept applications for potential candidates, present candidates to SMPO, facilitate election and voting process.<br>● Committee is active in spring as elections approach. First actions would be encouraging recruitment efforts, especially of outgoing members, beginning in March and intensifying in April. The Elections Committee should be prepared to present candidates and their materials at the May meeting of the SMPO. The bylaws do not require approval of the candidates by the whole of the Board. |
| **Goals:** | Conduct a fair and successful election for a governing board, following bylaws outlined in the current Charter (relevant excerpts below): Sherwood Charter 2017-2022 |
| **Charter/ Bylaws:** | ● Charter, Section 4.0 Governance Structure of School *(speaks to Elections Committee process)*<br>● BYLAWS, SECTION 2. SELECTION: The Board of Directors will be selected in the following way:<br>1. An Elections Committee, appointed by the Board of Directors, will accept applications for potential candidates. The Elections Committee shall be made up of two current members of the Board of Directors with terms that extend beyond the current year and one member of the Sherwood Montessori Parent Organization (SMPO);<br>2. The Elections Committee shall review applications and present a slate of candidates for consideration to the SMPO at the annual meeting in May. Voting will be carried out by the SMPO in consultation with the Elections Committee. Interim appointment shall be done in accordance with Article 4 Section 10 of these by-laws;<br>3. The top vote getter in the event of one seat being open or vote getters in the event of more than one seat being open shall win;<br>4. In the event of a tie, the deciding votes will be made by the Elections Committee.<br>5. New Directors will be announced before the end of the school year and will assume duties at the June meeting. |

| **Finance Committee** (Required, Ad Hoc) *includes Audit Committee and Budget Committee* | |
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| **Members:** | Committee has included in the past: School Director, Teacher Representative, Administrative Assistant(audit), Business Manager as Consultant, Board member<br><br>*Note: The Budget Committee requires only one Board member, but all members must be approved by a majority of the Board.* |
| **Meeting Frequency:** | Treasurer and Business Manager meet monthly to go over financial reports for the Board; Audit Committee meets once per year to set up audit; Budget Committee meets twice, 3 times yearly, for a total of 6 meetings to create each of the following: the 1st Interim Report, 2nd Interim Report, and Original Budget. |
| **Purpose:** | Meets as needed to set or review the budget and complete the annual budget and to complete the annual financial audit. |
| **Goals:** | The goal of the Budget Committee is to develop the Annual Budget and see that it is reported in compliance with the Charter. The procedure is outlined in sections 20.1, 20.2 & 20.3 |
| **Charter/ Bylaws:** | Charter: Section 20.0 Financial and Organizational Accountability<br>● 20.1 Procedure for the Development of the Annual Budget<br>● 20.2 Reporting of Annual Budget and Interim Reports<br>● 20.3 Legal Compliance of Budget<br>**Charter makes no direct reference to an "Audit Committee" but states that the BOD will facilitate the audit.*<br>Charter: Section 9.0 Financial and Programmatic Audit: The Sherwood Montessori BOD will facilitate an annual, independent audit of the financial affairs of the school and present this audit to the CUSD, the Butte County Office of Education, the State Controller, and the California Dept of Education. As a 501(c)3 nonprofit public benefit corporation, Sherwood Montessori will agree to comply with all state laws pertaining to financial reporting to the overseeing district and the state of California.<br>● 9.1 Fiscal Year & Reporting Deadlines<br>● 9.2 Contracting and Overseeing the Independent Audit<br>● 9.3 Qualifications of the Auditor<br>● 9.4 Scope of the Financial Audit<br>● 9.5 Programmatic Audit: In addition to the Financial Audit outlined above, the Administrative Assistant will maintain records necessary for the annual School Accountability Report Card (SARC) |

| **Safety Committee** | |
|---|---|
| **Members:** | Committee has included in the past: School Director, Staff Representative, Board Representative |
| **Purpose:** | Will monitor and ensure adherence to local fire regulations, conduct safety inspections, establish protocol for visitors, and align policies with the CUSD disaster plan. The SC will report their activities to the Board of Directors and work with the Board and the school's insurance carriers to continually improve the Safety Plan. The SC will propose policy changes/ improvements for acceptance by vote of the Board of Directors. |
| **Goals:** | 1. Survey teachers to identify potential safety issues that need to be addressed. (completed, ongoing with monthly inspections)<br>2. Review the school's safety policy and edit it for consistency and clarity. Develop a disaster policy and review communication protocols with parents in case of emergency.<br>3. Continue to address safety issues in a timely manner as they arise. |
| **Charter/ Bylaws:** | **Charter: Section 6.0 Health & Safety Procedures requires a Safety Committee & Safety Plan**<br>The BOD will establish a Safety Committee to monitor and insure adherence to local fire regulations, conduct safety inspections, establish protocol for visitors, and align policies with the CUSD disaster plan. The SC will report their activities to the Board of Directors and work with the Board and the school's insurance carriers to continually improve the Safety Plan.<br>6.1 Safety Plan, 6.2 Additional Health Policies, 6.3 Safe Building Policies |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Independent Study**

**Date:** September 16, 2021

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**SUMMARY**

An updated Independent Study Policy and Master Agreement are needed to comply with changes in the law.

**DISCUSSION**

Current Independent Study law requires that we update our policy to include new provisions including tiered reengagement strategies and live, synchronous instruction. We do not currently have a teacher assigned to long-term independent study, but we may need to provide short-term independent study (STIS) for students who are isolating due to illness in order to recoup funds we would lose because of absences. If we are required at any point in the future to close due to a COVID outbreak, having this policy that covers STIS will allow us to file the J-13 which would fund the school for days of closure due to emergency. Without an updated Independent Study policy, we would be unable to apply for these emergency funds.

**ACTION REQUESTED**

Approve updated Independent Study Policy and Master Agreement.

Attachments: Independent Study Policy and Master Agreement.

# SHERWOOD MONTESSORI DRAFT

## INDEPENDENT STUDY POLICY

Sherwood Montessori may offer independent study to meet the educational needs of pupils enrolled in the Charter School. Independent study is an alternative education designed to teach the knowledge and skills of the core curriculum. Sherwood Montessori shall provide appropriate existing services and resources to enable pupils to complete their independent study successfully. The following written policies have been adopted by the Board for implementation at Sherwood:

1. For pupils in all grade levels offered by Sherwood, the maximum length of time that may elapse between the time an assignment is made and the date by which the pupil must complete the assigned work shall be 20 school days.

2. The School Director or designee shall conduct an evaluation to determine whether it is in the best interests of the pupil to remain in independent study upon the following triggers:

    a. When any pupil fails to complete one assignment during any period of 10 school days.
    b. In the event a student's educational progress falls below satisfactory levels as determined by the Charter School's grading policy which considers ALL of the following indicators:
        i. The pupil's achievement and engagement in the independent study program, as indicated by the pupil's performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in Education Code Section 52060(d) paragraphs (4) and (5).
        ii. The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.
        iii. Learning required concepts, as determined by the supervising teacher.
        iv. Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

A written record of the findings of any evaluation conducted pursuant to this policy shall be treated as a mandatory interim pupil record. This record shall be maintained for a period of three years from the date of the evaluation and if the pupil transfers to another California public school, the record shall be forwarded to that school.

3. The Charter School shall provide content aligned to grade level standards that is provided at a level of quality and intellectual challenge substantially equivalent to in-person instruction.

4. For students who participate in independent study for fifteen (15) or more days in one

school year, the Charter School has adopted tiered reengagement strategies for all pupils who are not generating attendance for more than three (3) school days or 60% of the instructional days in a school week, or who are in violation of the written agreement pursuant to Education Code Section 51747(g). These procedures are as follows:

a. Verification of current contact information for each enrolled pupil;
b. Notification to parents or guardians of lack of participation within one school day of the absence or lack of participation;
c. Outreach from the Charter School to determine pupil needs including connection with health and social services as necessary;
    i. All students and families are expected to check in with their teacher or classroom aide daily, through online interaction, work completion, or phone conference. Online participation and/or work completion during distance learning is the equivalent of taking attendance when a student is on campus. Students who do not check in or complete work during distance learning will be marked absent. Students who are absent from distance learning for more than three school days or 60 percent of the instructional days in a school week, shall be supported by our tiered reengagement process.
        1. Tier 1
            a. The Sherwood Office will call or email to confirm the absence of a student, if the absence is not reported that day by a parent/guardian.
            b. When there are 3 absences, teachers or other Sherwood employees will attempt to make contact with the student and parent.
        2. Tier 2
            a. Students that are deemed 60% absent from the distance learning program will be reported to school administration. Administration will reach out and determine the cause for the absence. The school administration member will:
                i. Ensure that communication with the parent is working, phone dialer, emails, and internet access
                ii. Determine if there is a breakdown in communication and make any corrections
                iii. Determine if the lack of participation is due to a lack of access and the School will take the necessary steps to ensure the issue is resolved.
                iv. The parents will be informed that continued absences from distance learning could include:
                    1. A conference with an administrator
                    2. Development of an Attendance Plan through the Student Study Team (SST) process
                    3. Through the SST process, other forms of support will also be discussed such as additional time needed, emotional or mental health supports, and potential greater academic supports and interventions
                    4. As a last resort, discussion of repeating the

grade level content, either over the summer, or during the following school year

3. Tier 3
    a. If the reengagement strategies in Tiers 1 & 2 fail to improve distance learning attendance, then a follow-up SST will be held. The administrator may develop an attendance plan that includes:
        i. Teacher engagement
        ii. Both reward and consequences for further attendance
        iii. Review of the family circumstance for outside connection with health and social service
        iv. Discussion of repeating the grade level content, either over the summer or during the following school year

d. When the evaluation described above under paragraph 2.b.iv. is triggered to consider whether remaining in independent study is in the best interest of the pupil, a pupil-parent-education conference shall be required to review a pupil's written agreement and reconsider the independent study program's impact on the pupil's achievement and well-being. This conference shall be a meeting involving, at a minimum, all parties who signed the pupil's written independent study agreement.

5. For students who participate in independent study for fifteen (15) or more days in one school year, the following plan shall be in place in accordance with Education Code Section 51747(e) for synchronous instruction and live interaction:
    a. For pupils in transitional kindergarten through grade 3, inclusive, the plan to provide opportunities for daily synchronous instruction for all pupils throughout the school year by each pupil's assigned supervising teacher shall be as follows: All students and families will check in with their teacher or classroom aide daily, through online interaction, work completion, or phone conference. Students will be provided with links to view the class meeting and classroom instruction and access to online learning platforms.
    b. For pupils in grades 4-8, inclusive, the plan to provide opportunities for daily live interaction between the pupil and a certificated or non-certificated employee of the Charter School and at least weekly synchronous instruction for all pupils throughout the school year by each pupil's assigned supervising teacher shall be as follows: All students and families will check in with their teacher or classroom aide daily, through online interaction, work completion, or phone conference. Students will be provided with links to view the morning assembly and classroom instruction and access to online learning platforms.
6. For students who participate in independent study for fifteen (15) or more days in one school year, the following plan shall be utilized to transition pupils whose families wish to return to in-person instruction from independent study expeditiously, and, in no case, later than five instructional days:
    a. The student will be included in in-person instruction the following day after the

school receives notice from the student's family.

7. A current written agreement shall be maintained on file for each independent study pupil, including but not limited to, all of the following:

   - The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress.

   - The objectives and methods of study for the pupil's work, and the methods utilized to evaluate that work.

   - The specific resources, including materials and personnel, that will be made available to the pupil. These resources shall include confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.

   - A statement of the policies adopted pursuant to Education Code Section 51747, subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, the level of satisfactory educational progress, and the number of missed assignments allowed prior to an evaluation of whether or not the pupil should be allowed to continue in independent study.

   - The duration of the independent study agreement, including beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one school year.

   - A statement of the number of course credits or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.

   - A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, individuals with exceptional needs in order to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.

   - The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class or program pursuant to Education Code Section 48915 or 48917, the agreement

also shall include the statement that instruction may be provided to the pupil through independent study only if the pupil is offered the alternative of classroom instruction.

- ♦ Each written agreement shall be signed, prior to the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or care giver, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and all persons who have direct responsibility for providing assistance to the pupil. For purposes of this paragraph "caregiver" means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of the Family Code.

8. Sherwood shall comply with Education Code Sections 51745 through 51749.3 and the provisions of the Charter Schools Act and the State Board of Education regulations adopted there under.

9. The Executive Director shall establish regulations to implement these policies in accordance with the law.

SHERWOOD MONTESSORI

**Master Agreement for Independent Study**

Name: _____ ID#: _____
Grade: _____

Sp. Ed. Yes No Age _____ Birth Date_____ Sex: M F

Parent/Guardian:
_____

Mailing Address:
_____
Street Address City State Zip

Phone (H): _____ (W): _____(Cell):_____

School of Attendance: Sherwood Montessori
Program: Short Term Independent Study

School Year: _____ Semester/Trimester: _____

Entry Date: _____ Exit Date: _____

This master agreement is in effect for one semester/trimester. Independent Study is a voluntary optional educational alternative in which no pupil is required to participate; a classroom option is always available. In the case of a suspended expulsion student, pursuant to Ed Code 48915 or 48917, an alternative of classroom instruction has been offered and is available at all times. All resources and services of this school are available to the student.

1. Objective: The major objective for the duration of this agreement is to enable the student to keep current with grade level studies in the grade noted above, for the period covered by this agreement. This agreement is to enable the student to successfully reach the objectives and complete the assignments identified in the Assignment and Work-Record Form(s) that will be a fully incorporated part of this agreement. With the support of the parent, guardian, or caregiver, the student will submit assignments on or before their due date.
2. Board Policies: The School Director or designee shall conduct an evaluation to determine whether it is in the best interests of the pupil to remain in independent study upon the following triggers:

a. When any pupil fails to complete one assignment during any period of 10 school days.
b. In the event a student's educational progress falls below satisfactory levels as determined by the Charter School's grading policy which considers ALL of the following indicators:
    i. The pupil's achievement and engagement in the independent study program, as indicated by the pupil's performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in Education Code Section 52060(d) paragraphs (4) and (5).
    ii. The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments.
    iii. Learning required concepts, as determined by the supervising teacher.
    iv. Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

3. Resources: The School will provide the teacher services, instructional materials, and other necessary items and resources as specified for each assignment. Resources must include those reasonably necessary to the achievement of the objectives and must include resources that are normally available to all students on the same terms as the terms on which they are available to all. The school will confirm or provide access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.

The student will complete the studies listed below during the semester of the agreement as they are outlined in the curriculum.

List Method of Studies here:

_____

_____

_____

_____

The student's work will be evaluated by the method specified in the assignment and Work-Record Form incorporated herein. **The manner, time, frequency, and place for submitting a pupil's assignments, for reporting the pupil's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress:**

Frequency: _____ Day: _____ Time: _____

Manner:_____ Place: _____

**Student/Guardian Agreement**

**Student:**

*I understand that:*

1.Independent Study is a form of education that I have voluntarily chosen.

2.I am entitled to textbooks and supplies, connectivity and devices, supervision by my teacher, and all the services and resources received by other children enrolled in my grade.

3.I have the same rights as other students in my grade.

4.I must follow the rules and standards in the discipline code and behavior guidelines for Achieve Charter Schools.

5.If I do not complete one assignment in ten school days it will result in a review of my agreement.

*I agree to:*

1. Be supervised by and meet regularly with my teacher, as specified on Page 1.

2.Complete my assigned work by its due date, as explained by my teacher and described in my written assignments.

_____

Student Signature Date

**Parent/Guardian/Caregiver:**

*I understand that:*

1.The major objective of Independent Study is to provide a voluntary educational alternative for my student. I agree to the above conditions listed under "Student".

2.Learning objectives are consistent with and evaluated in the same manner that they would be if he or she was enrolled in the traditional school program.

3.If my student has an individualized education program (IEP), the IEP must specifically provide for his/her enrollment in Independent Study.

4.Unless otherwise indicated, the supervising teacher who signs this agreement will

meet with my student on a regular basis as specified on Page 1 to direct the student's study and measure progress toward the objectives in this agreement. It is my responsibility to promptly reschedule any appointment missed because of any emergency or other reason.

5.I am responsible for supervising my student while he or she is completing the assigned work and for ensuring the submission of all completed assignments necessary for evaluation.

6.I am liable for the cost of replacement or repair for willfully damaged or destroyed books and/or lost books and for any school property checked out to my student.

7.It is my responsibility to provide any needed transportation for my student's scheduled meetings and any other travel covered by this agreement.

8.I have the right to appeal to the school administrator any decision about my student's placement or school program in accordance with Sherwood Montessori procedures.

_____

Parent/Guardian/Caregiver Signature Date

AGREEMENT: We have read all pages of this agreement and hereby agree to all conditions set forth within.

_____

Parent/Guardian/Caregiver Signature Date Student Signature Date

_____

Teacher Signature Date Other Person who has Direct Responsibility Date

# SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

**Meeting ID:** Join Zoom Meeting
https://us02web.zoom.us/j/83528842617?pwd=dVN0YTBITXhRSWYveFk4SkJRelA2Zz09

Meeting ID: 835 2884 2617
Passcode: dTwBR5
One tap mobile
+16699006833,,83528842617#,,,,,,0#,,578950# US (San Jose)
+13462487799,,83528842617#,,,,,,0#,,578950# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 301 715 8592 US (Germantown)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
Meeting ID: 835 2884 2617
Passcode: 578950
Find your local number: https://us02web.zoom.us/u/kb7GYUNKp2

Date/Time: **Thursday, October 21, 2021 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00 p.m.)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA** (6:05 p.m.)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, September 16, 2021.

**B.2 Approval of Prop 39 Facilities Request** Consider approval of Prop 39 Request for Facilities.

**B.3 Approval of Contract with Mandelbaum Consulting** Consider approval of a contract with Mandelbaum Consulting.

**B.4 Unaudited Actuals** Accept the Business Manager's Unaudited Actuals Report.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications**

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**

**E.3 Action Items** (6:40)

**E.3.1 Budget Committee** The Board will consider approval of Budget Committee members.

**E.4 Board Governance** (6:45)

**F.4.1 Resolution 102121** The Board will consider passing a resolution to implement the provisions of AB 361, the Brown Act Emergency Teleconferencing Extension Bill.

**F. FUTURE AGENDA ITEMS** (7:00)

The Board will be asked to adopt the First Interim Budget.

**G. ADJOURNMENT** (7:10)

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# SHERWOOD MONTESSORI

**REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS**

Location:

***This meeting will be held online at*:**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,,,0#,,150836# US (San Jose)
+13462487799,,5245217471#,,,,,,0#,,150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington D.C)
Passcode: 150836

Date/Time: **Thursday, September 16, 2021 – 6:00 p.m.**

## Minutes

**A. CALL TO ORDER**

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*Meeting called to order at 6:00pm by Russell Shapiro. Russell Shapiro, Beth Hammer, Dan LaBar and Robyn Howley all present, Karey Cooper absent.*

**B. CONSENT AGENDA**

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, August 19, 2021.

**B.2 Contract Approval** Consider approval of a contract for a Cooking Instructor.

*Consent agenda items presented by Russell Shapiro. Discussion followed. Beth Hammer motioned for approval, Dan LaBar seconded with unanimous approval of present Board members.*

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA**

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

*Brandy Thomas requests the Board to consider a land acknowledgement of school Property to indiginous people.*

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS**

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6.25)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**

*Michelle Yezbick presented the Instructional Staff Report and School Director Report. Pat Casey presented Treasurer Report. SMPO Report not available. Discussion followed.*

**E.3 Action/Discussion Items**

**E.3.1 Election of Officers**

The Board will elect officers

**ACTION: REQUESTED:** Elect Officers

*Officer roles were presented by Russell Shapiro. Officer positions will be filled as noted below:*

*Chair: Russell Shapiro*
*Vice Chair: Robyn Howley*
*Secretary: Beth Hammer*
*Treasurer: Dan LaBar*

*Beth Hammer motioned to approve roles, Robyn Howley seconded with unanimous approval of present Board members.*

**E.3.2 ESSER III Expenditure Plan**

The Board will be asked to adopt the ESSER III Expenditure Plan

**ACTION REQUESTED:** Adopt Plan

*ESSER III Expenditure Plan presented by Michelle Yezbick. Discussion followed. Dan LaBar made motion to approve, Russell Shapiro seconded with unanimous approval of present Board members*

**E.4 Board Governance**

**E.4.1 Remarks from the Chair**

**E.4.2 Discussion of Recording** *The Delicate Dance of Working With a Board of Trustees*

**ACTION REQUESTED**: Discuss recording.

*Russell Shapiro presented information regarding the recording and the Brown Act. Discussion followed.*

**E.4.3 Committees**

The Board will be asked to appoint Directors to the required committees.

**ACTION REQUESTED:** Appoint committee members.

*Russell Shapiro presented and reviewed types of committees. The following committees will be joined by Board members as noted:*

*Finance Committee: Russell Shapiro*
*Safety Committee: Beth Hammer*
*Election Committee: Dan LaBar and Robyn Howley*

**E.4.4 Independent Study Policy Updates**

The Board will be asked to adopt an updated version of the Independent Study Policy and Master Agreement.

**ACTION REQUESTED:** Adopt updated policy.

*Independent Study Policy was presented by Michelle Yezbick. Discussion followed. Beth Hammer motioned to adopt updated policy, Robyn Howley seconded with unanimous approval of present Board members.*

**F. FUTURE AGENDA ITEMS**

The Board will be asked to approve a Prop 39 Facilities Request for the 2022-2023 school year.

The Board will be asked to approve a school calendar for the 2022-2023 school year.

The Board will acknowledge public request to consider land acknowledgement.

**G. ADJOURNMENT**

*Meeting adjourned at 7:30pm by Russell Shapiro.*

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SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Prop 39 Initial Request**

**Date:** October 21, 2021

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**SUMMARY**

The School Director has written a draft of the initial request for facilities that will go to Chico Unified School District by November 1.

**DISCUSSION**

Each year, the School Director writes a Prop 39 Reqest for facilities from CUSD. We are currently occupying facilities provided through this process. Our request for next year will be to stay where we are.

**ACTION REQUESTED**

Approve draft of Prop 39 Initial Request.

Attachments: DRAFT Prop 39 Initial Request

SHERWOOD MONTESSORI

1010 Cleveland
Chico, CA, 95928
(530) 345-6600
(530) 345-6620 fax

Via hand delivery

October 29, 2021

Superintendent Kelly Staley
Chico Unified School District
1163 E. Seventh Street
Chico, CA 95926

RE: Request for Proposition 39 Facilities for the 2022-23 School Year

Dear Superintendent Staley:

I am writing on behalf of Sherwood Montessori Charter School ("Charter School") to request reasonably equivalent school facilities from the Chico Unified School District ("District") pursuant to Education Code Section 47614 (i.e., Proposition 39) and Title 5 of the California Code of Regulations ("CCR") Section 11969.1 through 11969.11, as amended ("Implementing Regulations").

Proposition 39, passed by the voters of California on November 7, 2000, requires school districts to make available, to each charter school operating within the school district, school facilities sufficient for each charter school to accommodate all of the charter school's in-district students in conditions reasonably equivalent to those in which the students would be accommodated if they were attending other public schools of the school district. Facilities provided shall be contiguous, furnished, and equipped, and shall remain the property of the school district. In addition, the school district must make reasonable efforts to provide the charter school with facilities near to where the charter school desires to be located. (See Education Code Section 47614(b)).

The Proposition 39 Implementing Regulations, adopted by the State Board of Education ("SBE") in 2002, and amended in 2008, require the Charter School to make an annual written request for facilities. Title 5 CCR Section 11969.9(c)(1) specifies the information that must be included in the annual facilities request. This request, along with the information submitted herewith, meets and exceeds the requirements of Education Code Section 47614 and the Implementing Regulations.

**Projected Average Daily Attendance (ADA)**

In accordance with Education Code Section 47614(b)(2), the District is required to allocate school facilities to the Charter School for the following school year based upon a projection of average daily classroom attendance provided by the Charter School.

The Charter School's Board of Directors has determined that a reasonable projection of the Charter School's in-District average daily classroom attendance for the 2022-2023 school year is 88.04 The

following is a breakdown of the Charter School's projected average daily attendance ("ADA") as required by 5 CCR Section 11969.9(c)(1). The Charter School's ADA figures are based on the methodology outlined in the following section.

Please note:

- "Prior year" means the fiscal year prior to the year in which a facilities request is made. For this request, the prior year is 2020-21.
- "Current year" means the fiscal year in which a facilities request is made. For this request, the current year is 2021-22.
- "Request year" means the fiscal year for which facilities are being requested. For this request, the request year is 2022-23.

**Table 1: Total ADA**

| Grade Level | Actual Total Prior Year (P-2) | Projected Total Current Year | Projected Total Request Year |
|---|---|---|---|
| **Tk/K** | **14.86** | **9.37** | **20.00** |
| **1** | **24.94** | **16.86** | **20.00** |
| **2** | **12.58** | **19.67** | **16.86** |
| **3** | **14.7** | **11.24** | **19.67** |
| **4** | **11.13** | **11.24** | **11.24** |
| **5** | **19.08** | **13.11** | **11.24** |
| **6** | **3.97** | **9.37** | **13.11** |
| **7** | **7** | **1.87** | **9.37** |
| **8** | **6.94** | **5.62** | **1.87** |
| **total** | **115.2** | **98.343** | **123.36** |

**Table 2: Total In-District ADA**

| Grade Level | Actual Total Prior Year (P-2) | Projected Total Current Year | Projected Total Request Year |
|---|---|---|---|
| TK/K | 14.86 | 7.49 | 18.96 |
| 1 | 24.94 | 14.05 | 18.96 |
| 2 | 12.58 | 17.80 | 14.05 |
| 3 | 14.7 | 10.30 | 17.8 |
| 4 | 11.13 | 9.37 | 10.3 |
| 5 | 18.12 | 12.18 | 9.37 |
| 6 | 3.02 | 9.37 | 12.18 |
| 7 | 7 | 1.87 | 9.37 |
| 8 | 6.94 | 5.62 | 1.87 |
| total | 113.29 | 88.0404 | 112.86 |

**Table 3: Total Classroom ADA**

| Grade Level | Actual Total Prior Year (P-2) | Projected Total Current Year | Projected Total Request Year |
|---|---|---|---|
| Tk/K | 14.86 | 9.37 | 20.00 |
| 1 | 24.94 | 16.86 | 20.00 |
| 2 | 12.58 | 19.67 | 16.86 |
| 3 | 14.7 | 11.24 | 19.67 |
| 4 | 11.13 | 11.24 | 11.24 |
| 5 | 19.08 | 13.11 | 11.24 |
| 6 | 3.97 | 9.37 | 13.11 |
| 7 | 7 | 1.87 | 9.37 |
| 8 | 6.94 | 5.62 | 1.87 |
| total | 115.2 | 98.343 | 123.36 |

**Table 4: Total In-District Classroom ADA**

| Grade Level | Actual Total Prior Year (P-2) | Projected Total Current Year | Projected Total Request Year |
|---|---|---|---|
| TK/K | 14.86 | 7.49 | 18.96 |
| 1 | 24.94 | 14.05 | 18.96 |
| 2 | 12.58 | 17.80 | 14.05 |
| 3 | 14.7 | 10.30 | 17.8 |
| 4 | 11.13 | 9.37 | 10.3 |
| 5 | 18.12 | 12.18 | 9.37 |
| 6 | 3.02 | 9.37 | 12.18 |
| 7 | 7 | 1.87 | 9.37 |
| 8 | 6.94 | 5.62 | 1.87 |
| total | 113.29 | 88.0404 | 112.86 |

The following tables represent the projected **in-District ADA** (from Table 2 above) and **in-District classroom ADA** (from Table 4 above) broken down by grade level and the school in the District the pupils are otherwise eligible to attend. (5 CCR Section 11969.9(c)(2).)

| **School Name** | **TK** | **K** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **Total** |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Chapman** | 0 | 2.809 | 4.683 | 2.8098 | 2.809 | 1.873 | 1.873 | 0 | 0 | 0 | **16.85** |
| **Citrus** | 0 | 0.936 | 0.936 | 0 | 1.873 | 1.873 | 1.873 | 0 | 0 | 0 | **7.492** |
| **Emma** | 0 | 1.873 | 0 | 3.746 | 0 | 0.936 | 0 | 0 | 0 | 0 | **6.556** |
| **Little Chico Creek** | 0 | 0.936 | 0.936 | 3.746 | 1.873 | 0.936 | 2.809 | 0 | 0 | 0 | **11.23** |
| **Marigold** | 0 | 0 | 0.936 | 2.809 | 0 | 0.936 | 0.936 | 0 | 0 | 0 | **5.619** |
| **McManus** | 0 | 0 | 0.936 | 0.936 | 0.936 | 0.936 | 2.809 | 0 | 0 | 0 | **6.556** |
| **Neal Dow** | 0 | 0 | 0.936 | 0.936 | 0 | 0.936 | 0.936 | 0 | 0 | 0 | **3.746** |
| **Parkview** | 0 | 0 | 1.873 | 0.936 | 2.809 | 0 | 0.936 | 0 | 0 | 0 | **6.556** |
| **Rosedale** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Shasta** | 0 | 0.936 | 2.809 | 1.873 | 0 | 0 | 0 | 0 | 0 | 0 | **5.619** |
| **Sierra View** | 0 | 0 | 0 | 0 | 0 | 0.936 | 0 | 0 | 0 | 0 | **0.936** |
| **Bidwell Jr.** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7.492 | 0.936 | 2.809 | **11.239** |
| **Chico Jr.** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.936 | 0.936 | 1.873 | **3.746** |
| **Marsh** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.936 | 0 | 0.936 | **1.873** |
| **Total** | **0** | **7.492** | **14.04** | **17.795** | **10.30** | **9.366** | **12.17** | **9.366** | **1.873** | **5.619** | **88.04** |

**Methodology Used In Making ADA Projection:**

Title 5 CCR Section 11969.9(c)(1)(B) requires the facilities request to include a description of the methodology for the ADA projections. The Charter School utilized the following methodology in calculating the ADA projections:

| School Year | Enrollment | ADA Claimed at P-2 | Retention Rate from prior year | Growth Percentage Change | # of Wait Listed Children |
|---|---|---|---|---|---|
| **2010-11** | 89 | 87.52 | N/A | N/A | 140 |
| **20011-12** | 120 | 114.54 | 70% | 26% | 101 |
| **2012-13** | 140 | 134.26 | 94% | 14% | 106 |
| **2013-14** | 168 | 145.7 | 87% | 17% | 98 |
| **2014-15** | 146 | 137.63 | 90% | -13% | 113 |
| **2015-16** | 154 | 145.12 | 90% | 5% | 58 |
| **2016-17** | 138 | 136.038 | 65% | -10% | 115 |
| **2017-18** | 163 | 151.59 | 75% | 15% | 28 |
| **2018-19** | 157 | 150.03 | 79% | -3.75% | 39 |
| **2019-20** | 161 | 154.55 | 79%* | 2.52% | 3 |
| **2020-21** | 123 | 115.2 | 72% | -23.6% | 0 |
| **2021-22** | 105 | n/a | 77% | -14.634 | 0 |

*15 students moved out of the state due to the Camp Fire, including these students makes the # 72%

As demonstrated herein, we have analyzed our School's historical enrollment, retention, and growth trends, prior ADA figures, and historical wait list numbers in order to arrive at our total projected in-District classroom ADA figure for the request year. ADA numbers were based on an attendance rate of 93.66%.

The Charter School considered the number of students that have historically been on the wait list. Although the Charter School does not currently have students on its waiting list, it had a waiting list for the ten years prior to the onset of the COVID-19 pandemic. Currently in our area, and indeed across the country, kindergarten enrollment is aberrantly low due to concerns about the COVID-19 pandemic and its impact on schools' operations and student safety. Each year, the TK/K class waiting list has been the longest, and in the 2019-2020 school year Sherwood opened a second TK/K classroom, thus the small wait list for 2019-2020. In 2020-2021, Sherwood saw a decline in enrollment of TK/K students as did most LEAs in California, and we returned to a one TK/K class model. The Charter School has consistently been able to fill most slots in its classes, including the spaces from students who have not re-enrolled at the Charter

School. As a result, the Charter School anticipates being able to fill most of its projected students' slots for each grade level.

**Supporting Documentation**

Title 5 CCR Section 11969.9(c)(1)(C) requires the facilities request to include supporting documentation. The Implementing Regulations state that when a charter school is not yet open (i.e., not yet providing instruction) or to the extent an operating charter school projects a substantial increase in in-District ADA, the annual request must include documentation of the number of in-District students meaningfully interested in attending the Charter School. Please be advised that the Charter School is an existing school and does not project a significant increase in its in-District ADA. Accordingly, pursuant to the Implementing Regulations, please find attached our P-2 ADA forms for the prior year (2020-21) to support our projections and a roster of current year students by name, address, and phone number.

As you review the Charter School's ADA projections and supporting documentation, please keep in mind that the Proposition 39 regulations do not specify or require a particular type of supporting documentation to be used. Schools may submit any type of supporting documentation which they used to arrive at their ADA projections. This documentation must be "sufficient for the district to determine the reasonableness of the projection, but … **need not be verifiable for precise arithmetical accuracy**." (Section 11969.9(c)(1)(C); emphasis added.) The supporting documentation is intended only to demonstrate reasonableness of Charter School's request, not mathematical exactitude. However, should the District desire additional documentation or information regarding the Charter School's ADA projections, please contact me as soon as possible. We remain willing to cooperate with the District to immediately address any questions or concerns about this request and the supporting documentation.

**Operational Calendar:**

Title 5 CCR Section 11969.9(c)(1)(D) requires the facilities request to include the Charter School's operational calendar. The Charter School's operational calendar is attached for your review. The Charter School's first day of instruction for the 2022-2023 school year will be Monday, August 15th. Please note that Title 5 CCR Section 11969.9(j) requires the District to ensure that a furnished and equipped facility meeting the requirement of Proposition 39 be made available to the Charter School no less than ten (10) working days prior to the charter school's first day of instruction. In addition, in accordance with Section 11969.5, the space allocated must be made available for the Charter School's entire school year regardless of the School District's instructional year or class schedule.

**Educational Program:**

Title 5 CCR Section 11969.9(c)(1)(F) requires the facilities request to provide information regarding the charter school's educational program that is relevant to the assignment of facilities. The Charter School's educational program does have unique facility's needs. Sherwood Montessori operates grade levels transitional kindergarten through eighth grade on one contiguous school site. In the Montessori approach to education, multiple-age classrooms give students opportunities for leadership, access to mentors, and occasions for community building. When a Montessori school spans age levels traditionally grouped in separate classrooms, these multiple age grouping relationships are replicated on a school wide scale. Consequently, the Charter School's educational program requires a single contiguous school site in which to operate.

**Facility Location:**

Title 5 CCR Section 11969.9(c)(1)(E) requires the Charter School to provide information regarding the District school site and/or general geographic area in which the Charter School wishes to locate. Based upon the needs of the Charter School and the residency of the projected student enrollment, and based upon the investment in time and money to improve the facilities currently housing the Charter School, the Charter School desires to locate in its current facility on the Chapman Elementary campus.

**Procedures and Timelines:**

In accordance with the Implementing Regulations, the District is required to review the Charter School's attendance projections and to express any objections that it has about the Charter School's attendance projections in writing on or before December 1, 2021. The Charter School must respond to the District's written objections, if any, on or before January 2, 2022, and will either reaffirm or modify its projections as it deems necessary. (5 CCR Section 11969.9(d).)

Furthermore, we look forward to receiving a written preliminary facilities proposal from the District on or before February 1, 2022, as required under the Implementing Regulations. (5 CCR Section 11969.9(f).) The preliminary proposal must include, at a minimum, the following information: (1) a breakdown of the number of teaching stations (classrooms), specialized and non-classroom based space to be allocated to the Charter School, with an indication as to whether the space is exclusive or shared use; (2) the projections of in-District classroom ADA on which the proposal is based; (3) the specific location of the space; (4) all conditions pertaining to the space, including a draft of any proposed agreement pertaining to the Charter School's use of the space, (typically referred to as a facilities use agreement); (5) the projected pro rata share amount and a description of the methodology used to determine that amount; and (6) a list and description of the comparison group schools used in developing its preliminary proposal, and a description of the differences between the preliminary proposal and the Charter School's facilities request. In accordance with the Implementing Regulations (5 CCR Section 11969.2(d)), if the District's preliminary proposal (or final notification) does not accommodate Charter School at a single school site, the District's governing board must first make a finding that the Charter School could not be accommodated at a single site and adopt a written statement of reasons explaining the finding. The Charter School has until March 1, 2020, to respond to the preliminary proposal, expressing any concerns, addressing differences between the preliminary proposal and the facilities request, and/or making counter proposals.

The Implementing Regulations Section 11969.9(h) requires the District to provide a written final notification regarding the space to be allocated to the Charter School prior to April 1, 2022. The final notification specifically must include, at a minimum, the following:

(1) The teaching station, specialized classroom space, and non-teaching station space offered for the exclusive use of the charter school and the teaching station, specialized classroom space, and non-teaching station space which the charter is to be provided access on a shared basis with District operated programs, if any;
(2) For shared space, if any, the proposed arrangements for sharing;
(3) The in-District classroom ADA assumptions for the Charter School upon which the allocation is based and, if the assumptions are different than those submitted by the charter

school, a written explanation of the reasons for the differences;

(4) The specific location of the space;

(5) All conditions pertaining to the Charter School's use of the space;

(6) The pro rata share amount and a description of the methodology used to determine that amount;

(7) The payment schedule for the pro rata share amount, which shall take into account the timing of revenues from the state and from local property taxes; and

(8) A response to the Charter School's concerns and/or counter-proposals, if any.

A California Court of Appeals decision has made clear that, in meeting their Proposition 39 obligation, school districts must give the same degree of consideration to the needs of charter school students as it does to the students in district-run schools. The court noted that "accommodating a charter school might involve moving district-operated programs or changing attendance areas" and that providing a contiguous school facility to a charter school might require disruption and dislocation among district students, staff and programs. *Ridgecrest Charter School v. Sierra Sands Unified School District*, 130 Cal.App.4th 986 (2005). In addition, the Court concluded that a school district responding to a request for facilities must issue a statement of reasons at the time it makes its final determination that is "thorough" and "factual" enough to permit "effective review by the courts"; the statement of reasons issued by the school district must demonstrate that the district has "adequately considered all relevant factors" and that the district can "demonstrate a rational connection between those factors, the choice made, and the purposes of [Proposition 39]." Furthermore, as the District may be aware, two recent court cases clarified the manner in which a school district must allocate facilities to a charter school. Specifically, *Bullis Charter School v. Los Altos School District* (200 Cal.App.4th 1022), among other things, requires the District to perform a calculation of the square footage of all of the specialized and non-teaching station spaces at the comparison schools. The District must base its allocation of space to the Charter School on this analysis. In addition, the California Supreme Court has agreed to review whether a school district may use its internal "norming ratios", or student-teacher ratios, in determining the number of classrooms to offer to charter schools instead of using the facilities inventory at comparison group schools required by the Implementing Regulations. (*California Charter Schools Assn. v. Los Angeles Unified School District* (154 Cal.Rptr.3d 889 2013)).

Although Proposition 39 requires the District to allocate a school facility for Charter School use, the Charter School is amenable to discussing alternative facilities arrangements that meet both the needs of the District and the Charter School.

The Charter School Board of Directors has delegated to me the responsibility to negotiate the allocation of a facility under Proposition 39. All communications regarding this matter should be sent to my attention at the address below. My contact information is as follows:

Michelle Yezbick
1010 Cleveland, Chico, CA 95928
Phone: (530) 345-6600
Cell: (530) 966-8513

Fax: (530) 345-6620
michelle@sherwoodmontessori.org

I appreciate the has your time and consideration of this request and I look forward to developing a mutually agreeable plan to meet the facilities needs of the Charter School's in-District students. I acknowledge that the cooperative and professional approach that Chico Unified School District has taken in working with area charter schools takes time and resources and I applaud the District for being a model for other districts in California.

Sincerely,

Michelle Yezbick

School Director, Sherwood Montessori

cc: Sherwood Montessori Board Members:
Dr. Russell Shapiro
Dr. Beth Hammer
Dr. Robyn Howley
Dan LaBar
Karey Cooper

Sarah Kohlmann, Legal Counsel
Tina Keene, Director, State and Federal Programs, Chico Unified School District
Julie Kistle, Facilities, Director, Chico Unified School District

Attachments (the following attachments are incorporated by reference herein): Prior year P2 ADA forms, roster of current year students, operational calendar

# Sherwood Montessori

## 2022-2023 School Calendar

### August 2022

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

### September 2022

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | |

### October 2022

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | | | | | |

### November 2022

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | | | |

### December 2022

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

### January 2023

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | | | | |

### February 2023

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | | | | |

### March 2023

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

### April 2023

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | | | | | | |

### May 2023

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

### June 2023

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | |

### July 2023

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | | | | | |

School Closed
Parent Teacher Conferences
Employee Planning (no school for students)
Report Cards
First and Last Day of School

| | |
|---|---|
| Aug 8-12 | Planning/Development Days- no school |
| Aug 15 | First Day of School |
| Sep 5 | Labor Day - Closed |
| Oct 17-Oct 21 | Parent/Teacher conferences Dismissal 1:35 p.m. |
| Nov 11 | Veterans Day- no school |
| Nov 21-25 | Thanksgiving Break- no school |
| Dec 22 | Report Cards |
| Dec 22-Jan 6 | Winter Break-no school |
| Jan 16 | Dr. Martin Luther King Jr. Day-no school |
| Feb 10 | Lincoln's Birthday |
| Feb 20 | Presidents' Day |
| Mar 13-17 | Spring Break - no school |
| Apr 7-10 | Spring Travel Days no school |
| Apr 17-21 | Parent/Teacher conferences Dismissal 1:35 p.m. |
| May 29 | Memorial Day |
| Jun 1 | Last Day of School |

| Month | M | T | W | TH | F | Notes | 4-8 min | K-3-min | M | T | W | TH | F | M | T | W | TH | F |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Aug | 8 | 9 | 10 | 11 | 12 | Pro Dev Days | 0 | | | | | | | | | | | |
| Aug | 15 | 16 | 17 | 18 | 19 | First Day Aug. 15 | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Aug | 22 | 23 | 24 | 25 | 26 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Aug/Sep | 29 | 30 | 31 | 1 | 2 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Sept | 5 | 6 | 7 | 8 | 9 | Labor Day Holiday | 1240 | 1220 | | 305 | 305 | 305 | 305 | | 310 | 310 | 310 | 310 |
| Sept | 12 | 13 | 14 | 15 | 16 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Sept | 19 | 20 | 21 | 22 | 23 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Sept | 26 | 27 | 28 | 29 | 30 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Oct | 3 | 4 | 5 | 6 | 7 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Oct | 10 | 11 | 12 | 13 | 14 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Oct | 17 | 18 | 19 | 20 | 21 | Conference Week | 1150 | 1150 | 230 | 230 | 230 | 230 | 230 | 230 | 230 | 230 | 230 | 230 |
| Oct | 24 | 25 | 26 | 27 | 28 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Oct/Nov | 31 | 1 | 2 | 3 | 4 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Nov | 7 | 8 | 9 | 10 | 11 | Veterans Day Holiday | 1240 | 1220 | 305 | 305 | 305 | 305 | | 310 | 310 | 310 | 310 | |
| Nov | 14 | 15 | 16 | 17 | 18 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Nov | 21 | 22 | 23 | 24 | 25 | Thanksgiving Break | 0 | 0 | | | | | | | | | | |
| Nov/Dec | 28 | 29 | 30 | 1 | 2 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Dec | 5 | 6 | 7 | 8 | 9 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Dec | 12 | 13 | 14 | 15 | 16 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Dec | 19 | 20 | 21 | 22 | 23 | Winter Break | 1240 | 1220 | 305 | 305 | 305 | 305 | | 310 | 310 | 310 | 310 | |
| Dec | 26 | 27 | 28 | 29 | 30 | Winter Break | 0 | 0 | | | | | | | | | | |
| Jan | 2 | 3 | 4 | 5 | 6 | Winter Break | 0 | 0 | | | | | | | | | | |
| Jan | 9 | 10 | 11 | 12 | 13 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Jan | 16 | 17 | 18 | 19 | 20 | Martin Luther King Jr. Day | 1240 | 1220 | | 305 | 305 | 305 | 305 | | 310 | 310 | 310 | 310 |
| Jan | 23 | 24 | 25 | 26 | 27 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Jan/Feb | 30 | 31 | 1 | 2 | 3 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Feb | 6 | 7 | 8 | 9 | 10 | Lincoln's Birthday Holiday | 1240 | 1220 | 305 | 305 | 305 | 305 | | 310 | 310 | 310 | 310 | |
| Feb | 13 | 14 | 15 | 16 | 17 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| Feb | 20 | 21 | 22 | 23 | 24 | Presidents' Day | 1240 | 1220 | | 305 | 305 | 305 | 305 | | 310 | 310 | 310 | 310 |
| Feb/March | 27 | 28 | 1 | 2 | 3 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| March | 6 | 7 | 8 | 9 | 10 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| March | 13 | 14 | 15 | 16 | 17 | Spring Break | 0 | 0 | | | | | | | | | | |
| March | 20 | 21 | 22 | 23 | 24 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| March | 27 | 28 | 29 | 30 | 31 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| April | 3 | 4 | 5 | 6 | 7 | Spring Travel Day | 1240 | 1220 | 305 | 305 | 305 | 305 | | 310 | 310 | 310 | 310 | |
| April | 10 | 11 | 12 | 13 | 14 | Spring Travel Day | 1240 | 1220 | | 305 | 305 | 305 | 305 | | 310 | 310 | 310 | 310 |
| April | 17 | 18 | 19 | 20 | 21 | Conference Week | 1150 | 1150 | 230 | 230 | 230 | 230 | 230 | 230 | 230 | 230 | 230 | 230 |
| April | 24 | 25 | 26 | 27 | 28 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| May | 1 | 2 | 3 | 4 | 5 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| May | 8 | 9 | 10 | 11 | 12 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| May | 15 | 16 | 17 | 18 | 19 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| May | 22 | 23 | 24 | 25 | 26 | | 1550 | 1525 | 305 | 305 | 305 | 305 | 305 | 310 | 310 | 310 | 310 | 310 |
| May/Jun | 29 | 30 | 31 | 1 | 2 | emorial Day Holiday -Llast Day June 1 | 930 | 915 | | 305 | 305 | 305 | | | 310 | 310 | 310 | |
| **TOTAL** | | | | | | | | | | | | | | | | | | |
| | | | | | | | **55000** | **54150** | | | | | | | | | | |

| Month | M | T | W | TH | F | Notes | Inst. Day | Non-Inst. | Total Work |
|---|---|---|---|---|---|---|---|---|---|
| Aug | 8 | 9 | 10 | 11 | 12 | Pro Dev Days | 0 | 5 | 5 |
| Aug | 15 | 16 | 17 | 18 | 19 | First Day Aug. 15 | 5 | 0 | 5 |
| Aug | 22 | 23 | 24 | 25 | 26 | | 5 | 0 | 5 |
| Aug/Sep | 29 | 30 | 31 | 1 | 2 | | 5 | 0 | 5 |
| Sept | 5 | 6 | 7 | 8 | 9 | Labor Day Holiday | 4 | 0 | 4 |
| Sept | 12 | 13 | 14 | 15 | 16 | | 5 | 0 | 5 |
| Sept | 19 | 20 | 21 | 22 | 23 | | 5 | 0 | 5 |
| Sept | 26 | 27 | 28 | 29 | 30 | | 5 | 0 | 5 |
| Oct | 3 | 4 | 5 | 6 | 7 | | 5 | 0 | 5 |
| Oct | 10 | 11 | 12 | 13 | 14 | | 5 | 0 | 5 |
| Oct | 17 | 18 | 19 | 20 | 21 | Conference Week | 5 | 0 | 5 |
| Oct | 24 | 25 | 26 | 27 | 28 | | 5 | 0 | 5 |
| Oct/Nov | 31 | 1 | 2 | 3 | 4 | | 5 | 0 | 5 |
| Nov | 7 | 8 | 9 | 10 | 11 | Veterans Day Holiday | 4 | 0 | 4 |
| Nov | 14 | 15 | 16 | 17 | 18 | | 5 | 0 | 5 |
| Nov | 21 | 22 | 23 | 24 | 25 | Thanksgiving Break | 0 | 0 | 0 |
| Nov/Dec | 28 | 29 | 30 | 1 | 2 | | 5 | 0 | 5 |
| Dec | 5 | 6 | 7 | 8 | 9 | | 5 | 0 | 5 |
| Dec | 12 | 13 | 14 | 15 | 16 | | 5 | 0 | 5 |
| Dec | 19 | 20 | 21 | 22 | 23 | Winter Break | 4 | 0 | 4 |
| Dec | 26 | 27 | 28 | 29 | 30 | Winter Break | 0 | 0 | 0 |
| Jan | 2 | 3 | 4 | 5 | 6 | Winter Break | 0 | 0 | 0 |
| Jan | 9 | 10 | 11 | 12 | 13 | | 5 | 0 | 5 |
| Jan | 16 | 17 | 18 | 19 | 20 | Martin Luther King Jr. Day | 4 | 0 | 4 |
| Jan | 23 | 24 | 25 | 26 | 27 | | 5 | 0 | 5 |
| Jan/Feb | 30 | 31 | 1 | 2 | 3 | | 5 | 0 | 5 |
| Feb | 6 | 7 | 8 | 9 | 10 | Lincoln's Birthday Holiday | 4 | 0 | 4 |
| Feb | 13 | 14 | 15 | 16 | 17 | | 5 | 0 | 5 |
| Feb | 20 | 21 | 22 | 23 | 24 | Presidents' Day | 4 | 0 | 4 |
| Feb/March | 27 | 28 | 1 | 2 | 3 | | 5 | 0 | 5 |
| March | 6 | 7 | 8 | 9 | 10 | | 5 | 0 | 5 |
| March | 13 | 14 | 15 | 16 | 17 | Spring Break | 0 | 0 | 0 |
| March | 20 | 21 | 22 | 23 | 24 | | 5 | 0 | 5 |
| March | 27 | 28 | 29 | 30 | 31 | | 5 | 0 | 5 |
| April | 3 | 4 | 5 | 6 | 7 | Spring Travel Day | 4 | 0 | 4 |
| April | 10 | 11 | 12 | 13 | 14 | Spring Travel Day | 4 | 0 | 4 |
| April | 17 | 18 | 19 | 20 | 21 | Conference Week | 5 | 0 | 5 |
| April | 24 | 25 | 26 | 27 | 28 | | 5 | 0 | 5 |
| May | 1 | 2 | 3 | 4 | 5 | | 5 | 0 | 5 |
| May | 8 | 9 | 10 | 11 | 12 | | 5 | 0 | 5 |
| May | 15 | 16 | 17 | 18 | 19 | | 5 | 0 | 5 |
| May | 22 | 23 | 24 | 25 | 26 | | 5 | 0 | 5 |
| May/Jun | 29 | 30 | 31 | 1 | 2 | Memorial Day Holiday -Llast Day June 1 | 3 | 0 | 3 |
| **TOTAL** | | | | | | | | | |
| | | | | | | | **180** | **5** | **185** |

| DAILY SCHEDULE | | | | |
|---|---|---|---|---|
| Class | | Class Minutes | Lunch | Minutes |
| TK/K | 8:45-2:50 | 365 | 60 | 305 |
| 1st | 8:45-2:50 | 365 | 60 | 305 |
| 2-3 | 8:45-2:50 | 365 | 60 | 305 |
| 4-5-6 | 8:45-2:55 | 370 | 60 | 310 |
| 7-8 | 8:45-2:55 | 370 | 60 | 310 |

| LEGAL REQUIREMENT | |
|---|---|
| Instructional Minutes | TOTAL |
| 200 | 36000 |
| 280 | 50400 |
| 280 | 50400 |
| 300 | 54000 |
| 300 | 54000 |

| EXCESS OF REQUIREMENT | | |
|---|---|---|
| TK/K | **54150** | 18150 |
| 1st | **54150** | 3750 |
| 2-3 | **54150** | 3750 |
| 4-5-6 | **55000** | 1000 |
| 7-8 | **55000** | 1000 |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Contract with Mandelbaum Consulting**

**Date:** October 21, 2021

---

**SUMMARY**

The School Director is requesting approval of a contract to assist with state and federal program reporting and compliance.

**DISCUSSION**

Barbara Mandelbaumfrom my position with the Butte County Office of Education after twenty years in public school education, and ten years of dedicated service to state and federal programs as an educator, coach, and county office administrator.

**One thing I know for certain is compliance demands continue to grow at a much faster rate than staff capacity to learn, process, implement and build sustainable practices. This is where I can be of service; enhancing the productivity of your organization, and the staff working in your organization, by bridging the gap between isolated compliance training and sustainable organizational systems development.**

**State and Federal Programs District and Charter School Support When there is a struggle to understand and rectify audit findings or an inability to efficiently prepare for annual reporting and/or compliance reviews; When the culprit continues to be engagement, data and/or student group related**

**Charter Authorizing and Oversight Support for Small Districts and Charter Schools When small authorizing districts and charter school leaders need support developing systems for effective practices, building trusting relationships, and working from a place of transparency**

**Support with Long and Short-Term Project Development and Implementation When strategic planning, alignment of state and local documents, or alignment of documents with new or**

**existing initiatives feels messy, clumsy, and doesn't have the intended impact; When it feels impossible to align funding sources and create meaningful goals and actions…**

**I can support your LEA to work through the tough spots and build sustainable practices!**

**Other assignments If the work just seems to be piling up, I am available to support in any number of ways, including finalizing reports, reviewing policy, writing procedures, supporting with project development/ implementation, stakeholder engagement, coaching staff on categorical budgeting for both compliance and development of meaningful programs, and so forth. My skillset is diverse. Please don't hesitate to ask for support.**
**ACTION REQUESTED**

Approve contract with Mandelbaum Consulting.

Attachments: DRAFT Prop 39 Initial Request

MANDELBAUM CONSULTING

designing effective systems for improved educational outcomes

October 14, 2021

Sherwood Montessori
Michelle Yezbick
1010 Cleveland Ave.
Chico, CA 95928

Dear Michelle,

Thank you for taking the time to discuss the compliance needs of administrative staff at Sherwood Montessori. With many years of service in educational programs and compliance, I am certain I can support Sherwood Montessori with short-term state and federal compliance solutions through technical assistance and coaching of administrative staff.

The age-old saying, “It takes a village…” could not be more true when it comes to education compliance. Many hands impact student learning, both directly and indirectly. When LEAs make space for the development of effective systems, they build capacity to be student-centered and solutions-oriented. My approach focuses on developing the knowledge and skills staff need to successfully engage in compliance work in meaningful ways and the ability to implement sustainable practices for long-term success. This might include, but is not limited to a review of metrics and data analysis; root cause analysis, continuous improvement and implementation support, tool and resource development and quality control of existing documents and work flow.

I look forward to working with your team!

# SUMMARY OF CHALLENGES

Sherwood Montessori added a significant number of duties to the administrative team with the addition of federal Title I, III and ESSER funding intended to mitigate the impact of COVID-19 on the educational program, including student loss of learning and mental health and wellness.

In addition, multiple staff require explicit Montessori training and 1:1 classroom coaching, which must also be provided by the school Director. This important work takes significant time from the day also needed to build capacity for understanding state and federal compliance requirements. If Sherwood Montessori is selected for Federal Program Monitoring, ensuring the school is compliant is of the utmost importance in retaining existing funding allocations.

# PROPOSED SOLUTIONS & TIMELINE

**Federal Compliance**

Support the administrative team with the following Title I, Part A, Title III, Part A and ESSER requirements, as requested and agreed upon in regularly scheduled meetings:

1. Monitor and report to the Director, or designee, federal program updates, as released
2. As requested, and prioritized by Sherwood Montessori, provide coaching and/or technical assistance on the following federal program requirements:
    a. educational partner (stakeholder) feedback and inclusion in the decision-making process *****
    b. development of a comprehensive needs assessment; monitoring implementation and effectiveness of goals and actions, including student groups *****
    c. policy review for non-compliance and recommended language for revisions
    d. development and/or review of federal reports to ensure compliance
    e. coaching and technical assistance on use of the Compliance Monitoring Tool for evidence request collection

**State Compliance**

As requested, and prioritized by Sherwood Montessori, support the administrative team with the development of the 21-22 LCAP Annual Update and 22-23 LCAP for Board approval.

1. Provide coaching on priorities for the development of the LCAP Needs Analysis, Educational Partner (formerly Stakeholder), Metrics and Increased and Improved Services sections of the LCAP based on current CDE expectations, as delineated in the LCAP instructions. *****
2. Support the development and/or review of state reports, as requested, to ensure accuracy and compliance.

Items delineated with an asterisk (*) can often be paid with restricted funding.

# ANTICIPATED RESULTS

While there are dozens of compliance requirements associated with each funding source, the end result will be to ensure Sherwood Montessori receives necessary information to be compliant for state and federal funding. This will be accomplished by prioritizing information on mandated deadlines for reporting requirements, monitoring for non-compliance, ensuring Sherwood Montessori administration is aware of documentation requirements for elements of the compliance monitoring tool and, as requested, provide support with compliance report writing.

## Scope of Work

- **A.** Conduct an initial meeting with the Director to explore existing systems and identify compliance gaps
- **B.** Monitor federal programs information releases and trainings
- **C.** Conduct regularly scheduled check-ins with the Director, administrative team and/or designee
- **D.** Execute a plan for prioritized solutions to be completed within a defined period of time that also remain within the contract cap, including
    a. the development of organizational structures and systems to support long-term capacity to meet LCAP/SPSA annual requirements
    b. 1:1 and small group training and support, as requested

**Dates for Service(s):**
2021-2022 academic year

**Work Location:**
Remote. In person, as agreed.

**Services and Costs:**

| Service or Cost | Summary Description | Cost |
|---|---|---|
| **Initial Consultation** | One phone or virtual conversation up to 30 minutes to discuss perceived needs and fit with the skill set of the service provider | $0 |
| **Planning Meeting(s)** | One 2-hour meeting with Director and administrative team to gain a balcony view understanding of current funding sources, operational systems and team structure | $150 |
| **Research, Monitoring and/or Preparation** | Number of hours will vary based on training, meeting and reporting requirements released by CDE | $75/ hour |
| **Training, Coaching, Technical Assistance** | Number of hours will vary based on identified need of Director and non-compliance issues to be rectified with support | $75/ hour |
| **Additional Materials and/or Travel** | $500/ per night for overnight stay, all inclusive<br><br>No specific travel and/or materials are anticipated for this contract. | $0 |

| | |
|---|---|
| **Estimated Cost of Services Shall Not Exceed** | $3,750 |

**Acceptance of Statement of Work**
The total value of services on this statement of work shall not exceed $3,750 unless agreed to in writing by both parties. This is a multi-month project through June 30, 2022. The Client will be billed by the hour. Invoices will be mailed monthly with an itemized description of services provided. Please refer to the *Services and Costs* section of the *Scope of Work* for a detailed outline of estimated costs for services.

Clients are invoiced for services within one week of completion of service for projects concluding within less than 30 days. Multi-month projects are billed monthly, as agreed upon in the *Acceptance of Statement of Work* section above. The client shall be billed for any scheduled work cancelled with less than one-week notice. Payment is due upon receipt of invoice. The Client, as the primary decision-maker for the organization, assumes all legal, fiscal and compliance responsibility for final work products submitted to the CA Department of Education.

**All invoices shall be sent to the following client contact:**
Name: Michelle Yezbick
Email Address: michelle@sherwoodmontessori.org

**All checks shall be made payable to:**
Barbara Mandelbaum

**All payments should be mailed to:**
Mandelbaum Consulting
5378 CR 292 E
Kilgore, TX 75662

IN WITNESS WHEREOF, the parties hereto have caused the *Statement of Work* to be effective as of the day, month, and year written on the first page of this document.

_____
Barbara Mandelbaum, Owner
Mandelbaum Consulting

_____
Michelle Yezbick
Sherwood Montessori

Date of Board Approval _____

**CHARTER SCHOOL UNAUDITED ACTUALS**
**FINANCIAL REPORT -- ALTERNATIVE FORM**
**July 1, 2020 to June 30, 2021**

**Charter School Name:** SHERWOOD MONTESSORI CHARTER SCHOOL
**CDS #:** 04614240121475
**Charter Approving Entity:** Chico Unified
**County:** Butte
**Charter #:** 121475

**This charter school uses the following basis of accounting:**
**(Please enter an "X" in the applicable box below; check only one box)**

[ ] **Accrual Basis** (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 7438, 9400-9489, 9660-9669, 9796, and 9797)

[X] **Modified Accrual Basis** (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 7438, 7439, and 9711-9789)

| Description | Object Code | Unrestricted | Restricted | Total |
|---|---|---|---|---|
| **A. REVENUES** | | | | |
| **1.** LCFF Sources | | | | |
| State Aid - Current Year | 8011 | 574,838.00 | | 574,838.00 |
| Education Protection Account State Aid - Current Year | 8012 | 371,642.00 | | 371,642.00 |
| State Aid - Prior Years | 8019 | (1,520.00) | | (1,520.00) |
| Transfers to Charter Schools in Lieu of Property Taxes | 8096 | 380,763.00 | | 380,763.00 |
| Other LCFF Transfers | 8091, 8097 | | | 0.00 |
| Total, LCFF Sources | | 1,325,723.00 | 0.00 | 1,325,723.00 |
| **2.** Federal Revenues (see NOTE in Section L) | | | | |
| No Child Left Behind/Every Student Succeeds Act | 8290 | | 1,270.00 | 1,270.00 |
| Special Education - Federal | 8181, 8182 | | | 0.00 |
| Child Nutrition - Federal | 8220 | | | 0.00 |
| Donated Food Commodities | 8221 | | | 0.00 |
| Other Federal Revenues | 8110, 8260-8299 | | 183,560.00 | 183,560.00 |
| Total, Federal Revenues | | 0.00 | 184,830.00 | 184,830.00 |
| **3.** Other State Revenues | | | | |
| Special Education - State | StateRevSE | | 90,596.00 | 90,596.00 |
| All Other State Revenues | StateRevAO | 27,465.00 | 21,964.00 | 49,429.00 |
| Total, Other State Revenues | | 27,465.00 | 112,560.00 | 140,025.00 |
| **4.** Other Local Revenues | | | | |
| All Other Local Revenues | LocalRevAO | 2,748.00 | | 2,748.00 |
| Total, Local Revenues | | 2,748.00 | 0.00 | 2,748.00 |
| **5.** TOTAL REVENUES | | 1,355,936.00 | 297,390.00 | 1,653,326.00 |
| **B. EXPENDITURES (see NOTE in Section L)** | | | | |
| **1.** Certificated Salaries | | | | |
| Certificated Teachers' Salaries | 1100 | 407,270.00 | 56,634.00 | 463,904.00 |
| Certificated Pupil Support Salaries | 1200 | | | 0.00 |
| Certificated Supervisors' and Administrators' Salaries | 1300 | | | 0.00 |
| Other Certificated Salaries | 1900 | | | 0.00 |
| Total, Certificated Salaries | | 407,270.00 | 56,634.00 | 463,904.00 |
| **2.** Noncertificated Salaries | | | | |
| Noncertificated Instructional Salaries | 2100 | 97,187.00 | 31,311.00 | 128,498.00 |
| Noncertificated Support Salaries | 2200 | 14,937.00 | 1,253.00 | 16,190.00 |
| Noncertificated Supervisors' and Administrators' Salaries | 2300 | 82,122.00 | 740.00 | 82,862.00 |
| Clerical, Technical and Office Salaries | 2400 | 63,424.00 | 1,064.00 | 64,488.00 |
| Other Noncertificated Salaries | 2900 | | | 0.00 |
| Total, Noncertificated Salaries | | 257,670.00 | 34,368.00 | 292,038.00 |
| **Description** | **Object Code** | **Unrestricted** | **Restricted** | **Total** |
| **3.** Employee Benefits | | | | |
| STRS | 3101-3102 | 64,159.00 | 9,147.00 | 73,306.00 |
| PERS | 3201-3202 | 30,015.00 | 373.00 | 30,388.00 |
| OASDI / Medicare / Alternative | 3301-3302 | 26,283.00 | 2,639.00 | 28,922.00 |
| Health and Welfare Benefits | 3401-3402 | 82,113.00 | 9,998.00 | 92,111.00 |
| Unemployment Insurance | 3501-3502 | 6,121.00 | 871.00 | 6,992.00 |
| Workers' Compensation Insurance | 3601-3602 | 6,843.00 | 1,206.00 | 8,049.00 |
| OPEB, Allocated | 3701-3702 | | | 0.00 |
| OPEB, Active Employees | 3751-3752 | | | 0.00 |
| Other Employee Benefits | 3901-3902 | 3,323.00 | 515.00 | 3,838.00 |
| Total, Employee Benefits | | 218,857.00 | 24,749.00 | 243,606.00 |
| **4.** Books and Supplies | | | | |
| Approved Textbooks and Core Curricula Materials | 4100 | 233.00 | 912.00 | 1,145.00 |
| Books and Other Reference Materials | 4200 | 1,136.00 | 369.00 | 1,505.00 |
| Materials and Supplies | 4300 | 6,528.00 | 30,685.00 | 37,213.00 |
| Noncapitalized Equipment | 4400 | 2,111.00 | 46,359.00 | 48,470.00 |
| Food | 4700 | | | 0.00 |
| Total, Books and Supplies | | 10,008.00 | 78,325.00 | 88,333.00 |
| **5.** Services and Other Operating Expenditures | | | | |
| Subagreements for Services | 5100 | | | 0.00 |
| Travel and Conferences | 5200 | 126.00 | 842.00 | 968.00 |
| Dues and Memberships | 5300 | 2,207.00 | | 2,207.00 |
| Insurance | 5400 | 27,933.00 | | 27,933.00 |
| Operations and Housekeeping Services | 5500 | 43,428.00 | 10,830.00 | 54,258.00 |
| Rentals, Leases, Repairs, and Noncap. Improvements | 5600 | 13,088.00 | 32.00 | 13,120.00 |
| Transfers of Direct Costs | 5700-5799 | | | 0.00 |
| Professional/Consulting Services and Operating Expend. | 5800 | 148,622.00 | 53,092.00 | 201,714.00 |
| Communications | 5900 | 11,133.00 | 1,296.00 | 12,429.00 |
| Total, Services and Other Operating Expenditures | | 246,537.00 | 66,092.00 | 312,629.00 |
| **6.** Capital Outlay | | | | |
| (Objects 6100-6170, 6200-6500 modified accrual basis only) | | | | |

**CHARTER SCHOOL UNAUDITED ACTUALS**
**FINANCIAL REPORT -- ALTERNATIVE FORM**
**July 1, 2020 to June 30, 2021**

**Charter School Name:** SHERWOOD MONTESSORI CHARTER SCHOOL
**CDS #:** 04614240121475

| Description | Object Code | Unrestricted | Restricted | Total |
|---|---|---|---|---|
| Land and Land Improvements | 6100-6170 | | | 0.00 |
| Buildings and Improvements of Buildings | 6200 | | | 0.00 |
| Books and Media for New School Libraries or Major Expansion of School Libraries | 6300 | | | 0.00 |
| Equipment | 6400 | | | 0.00 |
| Equipment Replacement | 6500 | | | 0.00 |
| Depreciation Expense (accrual basis only) | 6900 | | | 0.00 |
| Total, Capital Outlay | | 0.00 | 0.00 | 0.00 |
| **7.** Other Outgo | | | | |
| Tuition to Other Schools | 7110-7143 | | | 0.00 |
| Transfers of Pass-Through Revenues to Other LEAs | 7211-7213 | | | 0.00 |
| Transfers of Apportionments to Other LEAs - Spec. Ed. | 7221-7223SE | | | 0.00 |
| Transfers of Apportionments to Other LEAs - All Other | 7221-7223AO | | | 0.00 |
| All Other Transfers | 7281-7299 | | | 0.00 |
| Transfers of Indirect Costs | 7300-7399 | | | 0.00 |
| Debt Service: | | | | |
| Interest | 7438 | | | 0.00 |
| Principal (for modified accrual basis only) | 7439 | | | 0.00 |
| Total Debt Service | | 0.00 | 0.00 | 0.00 |
| Total, Other Outgo | | 0.00 | 0.00 | 0.00 |
| **8.** TOTAL EXPENDITURES | | 1,140,342.00 | 260,168.00 | 1,400,510.00 |
| **C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)** | | 215,594.00 | 37,222.00 | 252,816.00 |
| **D. OTHER FINANCING SOURCES / USES** | | | | |
| **1.** Other Sources | 8930-8979 | | | 0.00 |
| **2.** Less: Other Uses | 7630-7699 | | | 0.00 |
| **3.** Contributions Between Unrestricted and Restricted Accounts (must net to zero) | 8980-8999 | | | 0.00 |
| **4.** TOTAL OTHER FINANCING SOURCES / USES | | 0.00 | 0.00 | 0.00 |
| **E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)** | | 215,594.00 | 37,222.00 | 252,816.00 |
| **F. FUND BALANCE / NET POSITION** | | | | |
| **1.** Beginning Fund Balance/Net Position | | | | |
| a. As of July 1 | 9791 | 715,528.00 | 173,415.00 | 888,943.00 |
| b. Adjustments/Restatements | 9793, 9795 | 9,746.00 | 58,914.00 | 68,660.00 |
| c. Adjusted Beginning Fund Balance /Net Position | | 725,274.00 | 232,329.00 | 957,603.00 |
| **2.** Ending Fund Balance /Net Position, June 30 (E+F1c) | | 940,868.00 | 269,551.00 | 1,210,419.00 |
| **Components of Ending Fund Balance (Modified Accrual Basis only)** | | | | |
| a. Nonspendable | | | | |
| 1. Revolving Cash (equals Object 9130) | 9711 | | | 0.00 |
| 2. Stores (equals Object 9320) | 9712 | | | 0.00 |
| 3. Prepaid Expenditures (equals Object 9330) | 9713 | | | 0.00 |
| 4. All Others | 9719 | 95,000.00 | 160,729.00 | 255,729.00 |
| b. Restricted | 9740 | | 108,822.00 | 108,822.00 |
| c. Committed | | | | |
| 1. Stabilization Arrangements | 9750 | | | 0.00 |
| 2. Other Commitments | 9760 | | | 0.00 |
| d. Assigned | 9780 | | | 0.00 |
| e. Unassigned/Unappropriated | | | | |
| 1. Reserve for Economic Uncertainties | 9789 | 220,000.00 | | 220,000.00 |
| 2. Unassigned/Unappropriated Amount | 9790M | 625,868.00 | 0.00 | 625,868.00 |
| **3. Components of Ending Net Position (Accrual Basis only)** | | | | |
| a. Net Investment in Capital Assets | 9796 | | | 0.00 |
| b. Restricted Net Position | 9797 | | | 0.00 |
| c. Unrestricted Net Position | 9790A | | | 0.00 |

| Description | Object Code | Unrestricted | Restricted | Total |
|---|---|---|---|---|
| **G. ASSETS** | | | | |
| **1.** Cash | | | | |
| In County Treasury | 9110 | | | 0.00 |
| Fair Value Adjustment to Cash in County Treasury | 9111 | | | 0.00 |
| In Banks | 9120 | 534,532.00 | 60,078.00 | 594,610.00 |
| In Revolving Fund | 9130 | | | 0.00 |
| With Fiscal Agent/Trustee | 9135 | 50,000.00 | | 50,000.00 |
| Collections Awaiting Deposit | 9140 | | | 0.00 |
| **2.** Investments | 9150 | | | 0.00 |
| **3.** Accounts Receivable | 9200 | | 45,132.00 | 45,132.00 |
| **4.** Due from Grantor Governments | 9290 | 410,855.00 | 32,869.00 | 443,724.00 |
| **5.** Stores | 9320 | | | 0.00 |
| **6.** Prepaid Expenditures (Expenses) | 9330 | | | 0.00 |
| **7.** Other Current Assets | 9340 | 95,000.00 | 160,729.00 | 255,729.00 |
| **8.** Capital Assets (accrual basis only) | 9400-9489 | | | 0.00 |
| **9.** TOTAL ASSETS | | 1,090,387.00 | 298,808.00 | 1,389,195.00 |
| **H. DEFERRED OUTFLOWS OF RESOURCES** | | | | |
| **1.** Deferred Outflows of Resources | 9490 | | | 0.00 |
| **2.** TOTAL DEFERRED OUTFLOWS | | 0.00 | 0.00 | 0.00 |
| **I. LIABILITIES** | | | | |
| **1.** Accounts Payable | 9500 | 69,343.00 | | 69,343.00 |

**CHARTER SCHOOL UNAUDITED ACTUALS**
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**July 1, 2020 to June 30, 2021**

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**CDS #:** 04614240121475

| | | | | |
|---|---|---|---|---|
| **2.** Due to Grantor Governments | 9590 | 80,176.00 | 21,817.00 | 101,993.00 |
| **3.** Current Loans | 9640 | | | 0.00 |
| **4.** Unearned Revenue | 9650 | | 7,440.00 | 7,440.00 |
| **5.** Long-Term Liabilities (accrual basis only) | 9660-9669 | | | 0.00 |
| **6.** TOTAL LIABILITIES | | 149,519.00 | 29,257.00 | 178,776.00 |
| **J. DEFERRED INFLOWS OF RESOURCES** | | | | |
| **1.** Deferred Inflows of Resources | 9690 | | | 0.00 |
| **2.** TOTAL DEFERRED INFLOWS | | 0.00 | 0.00 | 0.00 |
| **K. FUND BALANCE /NET POSITION** | | | | |
| Ending Fund Balance /Net Position, June 30 (G9 + H2) - (I6 + J2) (must agree with Line F2) | | 940,868.00 | 269,551.00 | 1,210,419.00 |

**L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT**

**NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:**

**1. Federal Revenue Used for Capital Outlay and Debt Service**
Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

| Federal Program Name (If no amounts, indicate "NONE") | Capital Outlay | Debt Service | Total |
|---|---|---|---|
| a. NONE | $ | | 0.00 |
| b. | | | 0.00 |
| c. | | | 0.00 |
| d. | | | 0.00 |
| e. | | | 0.00 |
| f. | | | 0.00 |
| g. | | | 0.00 |
| h. | | | 0.00 |
| i. | | | 0.00 |
| j. | | | 0.00 |
| TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE | 0.00 | 0.00 | 0.00 |

**2. Community Services Expenditures**
Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

| Objects of Expenditures | | Amount (Enter "0.00" if none) |
|---|---|---|
| a. Certificated Salaries | 1000-1999 | 0.00 |
| b. Noncertificated Salaries | 2000-2999 | 0.00 |
| c. Employee Benefits | except 3801- | 0.00 |
| d. Books and Supplies | 4000-4999 | 0.00 |
| e. Services and Other Operating Expenditures | 5000-5999 | 0.00 |
| TOTAL COMMUNITY SERVICES EXPENDITURES | | 0.00 |

**3. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:**
Results of this calculation will be used for comparison with 2019-20 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2022-23.

| | | |
|---|---|---|
| a. Total Expenditures (B8) | | 1,400,510.00 |
| b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred] | | 184,830.00 |
| c. Subtotal of State & Local Expenditures [a minus b] | | 1,215,680.00 |
| d. Less Community Services [L2 Total] | | 0.00 |
| e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total] | | 0.00 |
| TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE [c minus d minus e] | $ | 1,215,680.00 |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Instructional Staff Report**

**Date:** October 21, 2021

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***Instructional Staff was asked to respond to the questions:*** *What would you like the Board of Directors to know about your classroom?*

**Transitional Kindergarten/Kindergarten -Teresa Shippen**

This year our TK/K Class has only 11 students, (9 kinder and 2 TK). There are many reasons we can speculate about why there are so few, but the reality has been that we are tasked with educating 11 very sweet and willing learners! We are using our new Language intervention program to reach each student in a one-on-one or small group lesson each day. When you enter my classroom, you will hear the 4, 5, and 6 year olds using their phonics (letter sounds) to put together words and then using the same skills to read what they just wrote! This new program has many components and is time consuming, but so far the results are impressive. It would not be possible to reach each student with the same intensity during a regular year. An average year has had anywhere from 20-24 students and often a waitlist to get in. This unique situation has granted us the time needed to make up for the time these students may have otherwise been learning these skills in a preschool setting. Only three of the students in our room had some school experience prior to this year.

This small class size has affected other aspects of our room. We are able to teach and practice the lessons of the Montessori Grace and Courtesy curriculum with more integrity. There is almost always an adult nearby to guide the students in important lessons such as how to greet someone, asking a question, standing in a line, choosing a work, using materials properly, solving a disagreement and more. These lessons and experiences are aimed at helping a child to grow more independent and learn how to participate in a community setting.
As a result, our classroom has normalized and is a place of quiet, peaceful, working students who are exploring all aspects of the Montessori materials and curriculum. If you were to walk through our room you would see children at lessons, reading in the book corner, working on math, geography, botany, sensorial and many varieties of fine motor skill work. There is usually some soft chatter and often a student or two humming as they work happily throughout our morning work period. After the lunch break the students spend 15-20 minutes of quiet rest and journal time, followed by group lessons and sharing experiences. Our day has a nice flow, and the students seem genuinely happy to see each other each day.
It is a wonderful place to work and play and grow together!

**1st/2nd -Kim Powers**

Hello! My name is Ms. Kim, and I teach a 1st/2nd grade classroom with my aide, Ms. Cramer. I have 11 boys and 6 girls, 7 in first grade and 10 in second, half who were mine last year, and half who came from another classroom. The two halves took several weeks to meld, and still tend to work and play primarily with their original groups, though they are intertwining more now than at the beginning of the year.

If you were to walk into my classroom, you would see lots of shelves with materials on them from all the areas of the Montessori curriculum - Practical Life, Sensorial, Math, Language, and Science. Our current claim to fame is our classroom pets, Fluffy and Snowball, Abyssinian guinea pigs. The students love holding them and do so often. They are learning how to be good pet stewards and how to make animals feel safe.

At any given time, you might see students working on rugs on the floor, or at tables. The students know how to take a material off the shelf and use it, but we are still working on how to put things away and clean up after ourselves. They may be working individually, with a partner, or in a small group. They may be reading, writing, creating, or doing math. In the mornings and right after lunch, we do whole group lessons that break off into individual extension learning and our work periods. We use the internet which is displayed on a TV primarily for science videos and for looking at books in partnership with looking at real books in real life. I also have used it for my art enrichment class to look at various artwork.

Many of my students seem to have suffered academically from the pandemic and are therefore quite low (1-2 grade levels). Some of my students performing at the lowest levels have attendance issues that exacerbate their issues. My goal is to get everyone up to their proper grade level in language arts and math by the end of the school year, but I am finding myself coming up against a number of hurdles. One of the largest hurdles in my classroom is behaviors. I have a number of students who suffer from attention deficits. Behavior management systems are in place and work for many of my students, but for those who have attention and defiance problems, behaviors are problematic no matter what. They distract everyone from the learning that is supposed to be happening on a regular basis. I rely on help from many other teachers in the school to support these students on an as-needed basis and am utterly grateful for their flexibility and willingness to take on that supportive role. Everyone is always willing to help each and every student here at Sherwood to succeed.

**1st/2nd/3rd -Marlo Knox**

I had hoped to have more time to prepare my October Board Report. Maybe that is what the Board should know about my classroom? Marlo, and her classroom, are always wanting more time. We always have big ideas, dreams, and intentions. It's impossible to get everything we might desire done. That being said, we enjoy our work. And I'm enjoying taking a moment to share with you earnestly what I think you should know about my classroom.

My classroom is developmentally balanced, built on years of strong relationships, and grounded in common experience. Developmental balance means that I have an equal share of first year students (6-year-olds), second year students (7-year olds) and third year students (8-year olds). This year I currently have seven first year students, six second year students, and six third year students. A developmentally balanced classroom promotes peer teaching and guiding. Our classroom has a strong sense of community tied together with years of solid, deep, relationships. One family in my class has known me since I began teaching at Sherwood in 2013. Their knowledge of our larger community, our Sherwood culture, and our practices have grown as they participate fully in all aspects of our school. Another family has worked closely with me since 2016, and in the same way has engaged completely in our larger Sherwood community. All of my second year and third year students and families are returning to me from last school year. It's thrilling to serve a sibling of one of these students. In total that is 14 of the 17 families in my class that are known to me. My hope is that they feel as if they know me too. That they can trust me with their child/children. Together we can go through trials and celebrations, with mutual respect, a true appreciation for one another. Finally, in closing, my class is benefiting from the common experience my instructional assistant and I share. We have had the pleasure to work together for most of the previous school year. We both are university graduates with similar academic knowledge and experience. Foundationally we, Joy and I, are very aligned which creates a positive environment for the children and families we serve.

Room 6 is off to a great start. We have a lot of excellent work ahead of us. Each day is a pleasure.

**1st/2nd /3rd -Anne Adams**

Greetings, Sherwood Board!

When you present all subjects in a Montessori classroom, it's hard to predict which ones will catch on. Right now, we seem to be living for geography, theater, and song.

From the first day, I provided our puzzle maps as an independent work choice and was surprised how many kids chose them. After a while, I asked students to do that work alongside the laminated keys that bear the countries' names. From there, we devised The Traveler Game, where small groups take turns picking out countries from the key and chanting: "I am a traveler, great at navigation! The first one there picks the next destination!" Over several weeks now, as this game has surprisingly remained their favorite pass-time, I've wanted to find a way to keep it progressive. So today, I extended it further, issuing them blank "passports" that they can fill with the names of the countries they've identified. Believe it or not, they're still finding this fun!

Another surprise hit has been adapting plays from books. I swear I only gave one five-minute demonstration of this process to two students (both of whom particularly needed a positive outlet for drama), and suddenly, our whole Choose Your Own Adventure box set has been flung into full-time use, being converted into scripts. Yesterday, students premiered a play about a camper getting rescued from a mountaintop by a herd of benevolent yeti. What drama will tomorrow bring?

Of course we've also been doing plenty of music, which I always do...even so, I'm impressed by how hands-on this group has gotten. Two months ago, they were passive audience members, but very quickly, they became active choristers reading from songbooks. Now, some students have become strum-stick accompanists who read and interpret notation, practice during the work period, and volunteer to accompany the class when we all sing together.

I know these trends within our classroom's micro-culture will wax and wane, and be gradually overtaken by other obsessions—but I'm so curious which lessons will be next to land!

I'll keep you posted,

Anne

**4th /5th/6th -Jessi Lusardi**

I am currently teaching science and literature in 7th/8th grade, as well as lesson planning and teaching Math, Language, and cultural lessons in the 4/5/6 classroom. Michael, who is the co-teacher in middle school, comes into 4/5/6 in the late morning and stays until the end of school. Sherwood wasn't given a lot of time to find a qualified teacher for 4/5/6, so we are doing the best we can with a shortage of qualified applicants for the position. However, I don't think this schedule is sustainable for me in the long-term, and I am hoping that we find a qualified applicant soon. I am committed to making sure the students in 4/5/6 are getting quality lessons and the grade level standards are being met, but I am finding that I can't give the attention to the middle school gardening, outdoor science, field trips, and other opportunities that I would like to because I just don't have the time.

**4th /5th /6th-April Pearce**

I am delighted to report my class is making noticeable progress towards normalization, a state I feel we never reached last year. This is the state of the class when students know what to expect and they are able to get into their groove of work. Last week I was alone with my class one afternoon, and I needed to get a copy from the office. I was about to ask our student and noticed everyone was focused on their work. I snuck out, briskly got the copies and returned, without them noticing. I was so proud. In that moment, they were relying on themselves, not me, to regulate their behavior. Additionally, I had to have a sub all of this week and they have been working well with her and keeping up on their assignments.

I have also had more time to observe students in the classroom because they know what is expected. This is foundational to a Montessori teacher's work and I am finding it to be more important this year than any other. There is always variation in students' academic ability within a grade level and that feels more pronounced this year. Bluntly, my students are all over the place academically. After giving grade-level lessons, I find that some students are ready to do the follow-up work, some need scaffolding to do it, and some need a review of a preceding

lesson -they are not ready to complete the grade level assignment.

We all had a great field trip to MONCA and I am looking forward to more. Another fun thing going on is pets. We had a conference and narrowed down the list of possibilities. From there, we voted on the top pet decided to get a, "friendly snake." I also said we could get an invertebrate. Students researched, we set up the tank, and have five hermit crabs. We have finished researching what we need for the snake and are working on getting the supplies.

**7th/8th-Michael Whittemore**

This year in middle school we have a very happy and energetic group of (2) 7th graders and (6) 8th graders. They have had instruction of Science and Literature by Jessi and Math and History by myself. Though teaching separate subjects we work closely together implementing multiple subjects in projects working with real life situations. An example of this would be how in Math we were working with area and perimeter, while in science Jessi was teaching about soils and plant growth. We worked together on a class project measuring our planting areas and discussing what we would grow and what the soil needs would be of the plants. Creating and measuring spacing of plants and realizing it would be more efficient given our soil samples and space to do garden beds instead of planting in our ground.

Having a small group we have been able to develop great relationships with our students and work with aspects that engage them, which can be easy at times as this group is very social and enjoys interacting with group work and class discussions. With positive engagements in our class community we are really trying to foster social growth as well as academic ownership, having students recognize responsibility of not only their work, but also the impact they have in our community. A great project that displays this would be our farmers market the students helped organize with the help of Chef Richie. We are learning skills and responsibilities of a kitchen and developing a cookbook and honing our skills with the farmers market where we sell/giveaway for donations our culinary creations as well as bring a positive environment with musical performances by some of our students as well as encouraging positive role modeling and interactions of our middle school with our younger peers. They really enjoy this and if you possibly can come please come by and check out our next one, October 28th after school.

**Learning Center-Happy Yasko**

What is "The Learning Center"?

Our LC is set up in a way to promote a learning experience for any and all students. We focus on those students who need additional support. Mainly those with IEP's and 504's, but not limited to just those. The LC is set up in a way to work 1 on 1 with some students as well as with small groups. There are 2 separate rooms inside the center that can add additional privacy and noise-reduced learning environments.

When you walk into the LC the first thing you will notice is the camping tent that is set up with a small chair and table. It creates an atmosphere of fun in learning and yes it does get used. Students can and do work there with a teacher just outside the flap giving guided instructions or

by themselves with a chance to reset. All cleaning protocols are adhered to when a student is finished using it.

Just around the corner you will find up to 5 workstations or cubbies that can accommodate up to 5 students at a time for small group learning. I have mostly small group learning throughout the morning and individualized instruction in the afternoons. There is a separate room that holds up to 6 students and can be isolated if needed. It is great for various meetings. Our occupational and speech therapists use it when available. It also is used to separate students when both math and language arts are being taught at the same time. It works like one of the stations. Finally, there is a multipurpose room. This room is used in many ways and can be isolated as well. It has guitars and electric pianos set up for students to use when they need a reset or break. It also can be used for testing and assessing students' progress while the rest of the center is in use.

The LC here at Sherwood Montessori is a resource that I am proud to be a part of. It allows us to use many different strategies and techniques to enhance the learning experience for many of our students who need that little extra nudge in the right direction. The Learning Center isn't a building, it's a learning environment that houses the many skills and opportunities that await those who venture in. Like those who teach there, it is ever evolving to meet the ever changing at times challenging needs of the most important part of the Learning Center, our students.

When asked what goes on in here. I would have to respond with a pretty big grin. "Miracles happen here". I have been able to be a part of many "ah ha" moments in the early part of this school year. That is the reason I teach.

**Extended Day-Brenda Brown**

I am happy to report that the Before/Aftercare classroom is running smoothly! We currently have 60 students enrolled in aftercare...thankfully we have never had all attend at once. This is what our aftercare schedule looks like;

2:55-3:10- check in and snack
3:10-4:10- work/tutor time
4:10-4:30- recess time
4:30-5:30- free choice

During the work/tutor time I pull 3 different math groups TK/K, 1-3rd, and 4-8th and do a 10 minute Jumpstart Math Routine. We also pull a Kinder group and do their weekly language practice. We have purchased a variety of Montessori materials for the kids to work with. Today we had 35 kids in our room, it felt busy but I stood back to observe and saw everyone on task! One of my favorite Montessori quotes is, "The greatest sign of success for a teacher... is to be able to say, 'The children are now working as if I did not exist.'" We have kept up the walls and held our expectations of what work time looks like and I'm amazed and proud to see the

normalization process happening in this environment! Last month the kiddos even filled our greatness jar and we celebrated with a real movie-like experience. (See pics below) Feel free to check out our room anytime.



SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** October 21, 2021

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**Administrative**

- Updated enrollment will be reported at the meeting.
- One of our Upper Elementary teachers, Sheng Vang, resigned at the end of last month to devote time to family. We have coordinated to cover the classroom with existing staff while searching for a Montessori trained teacher. We currently have a very small middle school with 8 students led by two credentialed teachers as Michael Whittemore is working under an intern credential. Jessi Lusardi is the other teacher originally assigned to the middle school. Jessi is now taking lead teacher duties for the upper elementary while Michael takes lead teacher duties for the middle school. I am providing consult and Montessori lessons for the upper elementary team. We are all meeting along with April Pearce, our other upper elementary teacher, each Monday to keep consistency for the students and the program.
- The middle school received a shipment of new furniture for its classroom (furniture was ordered over the summer but slow in arriving due to supply chain issues) and mulch for the garden areas.
- The library and science room, which had been used to store extra furniture when classrooms returned to in-person instruction but needed to maintain social distancing, are now being set up for their original purposes.
- We have been having Chef Richie come to teach Culinary Arts to the middle school on Thursday afternoons, and he does cooking projects with the aftercare program on Thursdays as well. We have also started having monthly Farmers' Markets, a beloved Sherwood community event.
- Maribel DeLaCerda is returning to Sherwood staff (six years' experience in classified positions) as a reading intervention instructor. Maribel will be implementing the Montessori Reading Remediation Pathway for students needing phonics instruction for any student shown by assessment to need the support.
- Sherwood Montessori was recognized at the recent El Dorado Charter SELPA CEO Council meeting for being a long-standing member with five years in partnership.
- I attended a Mechoopda Tribal Council meeting on October 2nd to inquire about the process for developing the appropriate language for a land acknowledgment. The Council has appointed an Arts and Cultural Outreach Committee to assist with land acknowledgements. Mark Alabanza, the Tribal Administrative Officer, communicated that the process would include collaboration and take time, but would ultimately be meaningful for both the Tribe and the school.

**Safety**

- COVID illnesses, testing, and exposures continue to have a disruptive impact on the school. Administrative staff are pulled from their regular duties to test, call parents about possible exposures and request consent to test, and explain quarantine durations and independent study options. Students who are ill or who are exposed miss school and must be reintegrated into the classroom when they return. Staff who are ill or exposed or who must care for a family member who has become ill or exposed must be covered by substitutes. We continue to do the best we can with a challenging situation.
- Our Fall Festival was cancelled due to COVID related issues. However, our SMPO leaders came to campus on Friday, October 8th and ran a scaled down version with parent volunteers during the afternoon recess. Our SMPO continues to be flexible and creative in these times that demand it.

**Legislative**

- There was no extension of "hold harmless" for ADA loss, Independent Study is the only way to recoup ADA for absences due to Covid or otherwise. Students who need to quarantine due to COVID illness or exposure are being given work to take home and appointments with their teachers for daily live instruction opportunity.
- At a recent California Charter Schools Association regional meeting (Butte, Sutter, Glenn) members identified the different treatment of funding from the State for charters and district schools as a key issue for CCSA advocacy. Currently, district schools and county offices of education can choose between current
- The significant increase in new Private School Affidavits (PSA) and the current ban on new non-classroom based charter schools is saving the State of California, conservatively, tens of millions of dollars in per pupil funding costs.

# SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Treasurer's Report**

**Date:** October 21, 2021 Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of September 2021 reconciled with, or matched, those of the school's internal reports. The New Balance totaled $ 804,281.87 as of September 30, 2021 for the checking account and $50,000 in the special account to assure the contract work at 1010 Cleveland was completed and signed off by the county. It is now complete so the funds can be returned to the checking account.
- There were no unexpected high-cost expenses in September.

Profit & Loss

- The September Profit & Loss report shows a Net Income of -$131,213 which is offset by September LCF and EPA funds totaling $140,586 deposited in October. ARPA and COVID funds of $24,700 and $14,626 were also in that deposit.

Cash Flow

- Assuming all ESSER Funds are received and the state allows the same 145 ADA as last year for LCF/EPA calculations, the school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Balance Sheet - Current Month
**Accrual Basis** — As of September 30, 2021

| | Sep 30, 21 |
|---|---|
| **ASSETS** | |
| **Current Assets** | |
| **Checking/Savings** | |
| **9100-Assets** | 784,622 |
| **Total Checking/Savings** | 784,622 |
| **Other Current Assets** | |
| **9290 - Due from Grantor Govts.** | -18,037 |
| **9340-Security Deposit** | 50,000 |
| **Total Other Current Assets** | 31,963 |
| **Total Current Assets** | 816,585 |
| **Fixed Assets** | |
| **9410 - Land** | 95,000 |
| **9430- Building** | 182,515 |
| **9435-Accumulated Depreciation** | -21,786 |
| **Total Fixed Assets** | 255,729 |
| **TOTAL ASSETS** | **1,072,314** |
| **LIABILITIES & EQUITY** | |
| **Liabilities** | |
| **Current Liabilities** | |
| **Accounts Payable** | |
| **9500-Accounts Payable** | 9,250 |
| **Total Accounts Payable** | 9,250 |
| **Credit Cards** | |
| **SHERWOOD COSTCO VISA** | 4,415 |
| **Total Credit Cards** | 4,415 |
| **Other Current Liabilities** | |
| **9500-Liabilities** | 153,457 |
| **Total Other Current Liabilities** | 153,457 |
| **Total Current Liabilities** | 167,122 |
| **Total Liabilities** | 167,122 |
| **Equity** | |
| **Restricted Assets** | |
| **NONSPENDABLE- ALL OTHERS** | 255,729 |
| **Restricted Assets - Fed/State** | 108,822 |
| **Total Restricted Assets** | 364,551 |
| **Unassigned/Unaapproriated** | |

| | Sep 30, 21 |
|---|---|
| Reserve- Economic Uncertainti... | 220,000 |
| Unassigned/Unappropriated | 625,867 |
| **Total Unassigned/Unaapproriated** | 845,867 |
| **Net Income** | -305,226 |
| **Total Equity** | 905,192 |
| **TOTAL LIABILITIES & EQUITY** | **1,072,314** |

# Sherwood Montessori
## Profit & Loss YTD Comparison
### September 2021

| | Sep 21 | Jul - Sep 21 |
|---|---|---|
| **Ordinary Income/Expense** | | |
| **Income** | | |
| **8000-Revenues** | 43,842 | 73,739 |
| **Total Income** | 43,842 | 73,739 |
| **Gross Profit** | 43,842 | 73,739 |
| **Expense** | | |
| **1000 Certificated Salaries** | 62,475 | 128,045 |
| **2000 Classified Salaries** | 44,809 | 80,630 |
| **3000-Employee Benefits** | 31,344 | 73,677 |
| **4000-Books and Supplies** | 12,185 | 35,879 |
| **5000 Services/Other Op. E...** | 24,242 | 60,734 |
| **Total Expense** | 175,055 | 378,965 |
| **Net Ordinary Income** | -131,213 | -305,226 |
| **Net Income** | **-131,213** | **-305,226** |

# Sherwood Montessori
## Board of Directors - Vendor Payments Report
### September 2021

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 09/01/2021 | DBT | Dollar Tree | Materials PE - 22 swim noodles | Instructional Supplies | 23.60 |
| Credit Card C... | 09/01/2021 | | NCS Pearson INC. | Instructional books - Learning center | 4100-Textbooks/Core Cu... | 3,120.33 |
| Check | 09/01/2021 | 9249 | Nancy R Calkins | MW psychotherapy | Contracted Service | 300.00 |
| Check | 09/01/2021 | DBT | CharterSAFE | 21-22 P&L PREMIUM 1 | 5400-Liability Insurance | 2,641.00 |
| Check | 09/01/2021 | DBT | CharterSAFE | 21-22 WC PREMIUM 1 | 3601-Workers Comp | 752.00 |
| Check | 09/02/2021 | 9230 | TIAA Commercial Finance, Inc. | SEPTEMBER | Copier Lease | 243.63 |
| Check | 09/03/2021 | DBT | Paypal | Marshall memo | Contracted Service | 50.00 |
| Check | 09/03/2021 | DBT | Amazon.com | Office supplies | Office Supplies | 93.18 |
| Check | 09/03/2021 | DBT | Amazon.com | 2pack Reaching tool | Office Supplies | 18.22 |
| Check | 09/04/2021 | DBT | Indeed | Ad | Advertising | 70.94 |
| Check | 09/07/2021 | EFT | Comcast 4454 | AUGUST-SEPTEMBER SERVICE | Internet Service Provider | 211.45 |
| Check | 09/07/2021 | 9253 | Hernandez Cleaning Service | INV 30155 - August service | Housekeeping Services | 3,350.00 |
| Check | 09/07/2021 | DBT | Costco | Bags | Custodial Supplies | 53.97 |
| Check | 09/07/2021 | DBT | Costco | Masks | PPE | 13.98 |
| Check | 09/07/2021 | DBT | Costco | Snacks | Extended Day | 133.55 |
| Check | 09/07/2021 | DBT | Costco | Batteries, coffee, and half and half | Instructional Supplies | 69.86 |
| Check | 09/08/2021 | 9258 | Creative Apple | Supplies | Instructional Supplies | 51.08 |
| Check | 09/08/2021 | 9257 | Richard Hirshen | Kitchen equipment and fruit | Kitchen and garden | 63.30 |
| Check | 09/08/2021 | 9256 | Hernandez Cleaning Service | INV 30156 | Housekeeping Services | 200.00 |
| Check | 09/08/2021 | 9256 | Hernandez Cleaning Service | Reimbursement to Leticia Vasquez | Maintenance Supplies | 36.96 |
| Check | 09/08/2021 | 9254 | Advanced Document | August service | Copier Lease | 447.60 |
| Check | 09/08/2021 | 9255 | Marlo . Knox | Supplies | Instructional Supplies | 48.78 |
| Check | 09/08/2021 | EFT | Waste Management | AUGUST SERVICE | Trash/Recycling | 127.97 |
| Check | 09/08/2021 | DBT | Costco | Masks | PPE | 40.71 |
| Check | 09/08/2021 | DBT | USPS | Mailing | Postage | 8.55 |
| Check | 09/08/2021 | DBT | Guitar Center | Music supplies | Instructional Supplies | 176.89 |
| Check | 09/09/2021 | DBT | Neacail Murdock | MOVE CLASSROOMS | Contracted Service | 277.44 |
| Credit Card C... | 09/09/2021 | | Microsoft | Subscription | Software Licensing | 6.71 |
| Check | 09/10/2021 | ACH | CharterSAFE | 21-22 P&L PREMIUM 1 | 5400-Liability Insurance | 2,641.00 |
| Check | 09/10/2021 | ACH | CharterSAFE | 21-22 WC PREMIUM 1 | 3601-Workers Comp | 752.00 |
| Check | 09/10/2021 | DBT | Safeway | Flour | Food (Instructional) | 6.98 |
| Check | 09/10/2021 | DBT | Pearson Clinical Assessment | Learning Center SpEd | 4100-Textbooks/Core Cu... | 209.18 |
| Check | 09/13/2021 | 9259 | Law Offices of Young, Minney & ... | Services | Attorney | 98.80 |
| Check | 09/13/2021 | DBT | Worm Farm | Compost | Instructional Supplies | 250.15 |
| Check | 09/13/2021 | DBT | Lowe's | Wood raised garden bed | Kitchen and garden | 173.38 |
| Check | 09/13/2021 | DBT | Amazon.com | Books | 4200-Books/reference M... | 103.80 |
| Check | 09/15/2021 | EFT | T Mobile Hot Spot | Hotspot | Wifi - Distance Learning | 90.00 |
| Check | 09/15/2021 | EFT | Verizon Wireless | September service | Telephone, Cellular | 100.08 |
| Check | 09/15/2021 | EFT | Jessica Lusardi | Paint supplies, soil, plants | Kitchen and garden | 203.35 |
| Check | 09/15/2021 | EFT | Comcast Business 9110 | AUGUST-SEPTEMBER | Internet Service Provider | 291.64 |
| Check | 09/15/2021 | 9262 | Chico Country Day | NATALIE WREN - NURSE -Inv 10022-00137 | Contracted Service | 1,242.47 |
| Check | 09/15/2021 | 9263 | KIM POWERS | Art supplies - misc art room | Instructional Supplies | 478.91 |
| Check | 09/15/2021 | DBT | Amazon.com | 2pack Reaching tool | Office Supplies | 18.22 |
| Check | 09/15/2021 | 9260 | Danielle Moncrief | Livescan | LiveScan and TB Test S... | 64.00 |
| Check | 09/15/2021 | DBT | STAPLES | 2 pocket HD Poly | Instructional Supplies | 47.88 |
| Check | 09/15/2021 | DBT | Costco | Snacks | Instructional Supplies | 288.41 |
| Check | 09/15/2021 | DBT | USPS | Mailing | Postage | 11.46 |
| Check | 09/15/2021 | DBT | Bay Area Montessori Association | Membership | 5300-Dues and Members... | 35.00 |
| Check | 09/15/2021 | DBT | Waseca | Reading program | 4200-Books/reference M... | 230.00 |
| Check | 09/15/2021 | DBT | Amazon.com | Bubble gum brain activity | Instructional Supplies | 31.22 |
| Check | 09/15/2021 | DBT | Amazon.com | Masks | Office Supplies | 75.06 |
| Credit Card C... | 09/17/2021 | | Costco | 2 3-year plans | LAPTOP/CHROME WA... | 199.98 |
| Credit Card C... | 09/17/2021 | | Costco | Epsom printer | Computers and Electronics | 268.11 |
| Credit Card C... | 09/17/2021 | | Costco | 2 hp laptops | Computers and Electronics | 1,103.91 |
| Check | 09/17/2021 | EFT | Michael Whittemore | Drums | Instructional Supplies | 26.80 |
| Check | 09/17/2021 | EFT | Heather Fisher | mileage | 5200-Travel and Confere... | 17.35 |
| Check | 09/17/2021 | EFT | Laura Swanson | SEL BOOKS | 4100-Textbooks/Core Cu... | 112.16 |
| Check | 09/17/2021 | EFT | Laura Swanson | Supervision by Nora Illa, LCSW PPS | Instructional Supplies | 725.95 |
| Check | 09/17/2021 | EFT | Laura Swanson | Sensory | Instructional Supplies | 132.61 |
| Check | 09/17/2021 | 9264 | Brenda Brown | Reading loft building materials | Extended Day | 1,309.14 |
| Check | 09/17/2021 | 9265 | ScherBa Media | Photography and video service INV 1164 | Contracted Service | 650.00 |
| Check | 09/17/2021 | 9266 | Shayla Nelson | Livescan | LiveScan and TB Test S... | 64.00 |
| Check | 09/17/2021 | DBT | Wufoo | SEPTEMBER SERVICE | Online List Management | 19.00 |
| Check | 09/19/2021 | DBT | Amazon.com | Football, soccer ball, payground ball | LCAP | 48.75 |
| Check | 09/20/2021 | DBT | Amazon.com | Marlo watering can | Instructional Supplies | 10.71 |
| Check | 09/22/2021 | DBT | Costco | Snacks | Food (Instructional) | 263.55 |
| Check | 09/22/2021 | DBT | Amazon.com | Cold pack | Office Supplies | 31.62 |
| Check | 09/23/2021 | DBT | EDUCATION.COM | ANNUAL SUBSCRIPTION | Instructional Supplies | 59.94 |
| Check | 09/23/2021 | DBT | Mendes Supply Co. | Clorox - towels - tissue | Custodial Supplies | 264.94 |
| Check | 09/23/2021 | DBT | Mendes Supply Co. | Copier paper | Office Supplies | 83.60 |
| Check | 09/23/2021 | DBT | Costco | Cups and bags | Office Supplies | 80.79 |
| Check | 09/23/2021 | DBT | Lowe's | Hose bibb | Maintenance Supplies | 11.78 |
| Check | 09/23/2021 | DBT | Amazon.com | Office chair mat | Extended Day | 28.93 |
| Check | 09/24/2021 | DBT | Walmart | PE noodles | Instructional Supplies | 2.50 |
| Check | 09/24/2021 | DBT | Walmart | Supplies | Kitchen and garden | 70.31 |
| Check | 09/24/2021 | DBT | Amazon.com | Brita faucet filter | Kitchen and garden | 21.44 |
| Check | 09/24/2021 | DBT | Amazon.com | Near vision card | Instructional Supplies | 45.32 |
| Check | 09/24/2021 | DBT | Law Offices of Young, Minney & ... | Webinar - independant study - Vanessa | Attorney | 30.00 |
| Check | 09/25/2021 | DBT | Amazon.com | Brita water filter | Kitchen and garden | 21.44 |
| Check | 09/26/2021 | DBT | US Chef'Store | Window squeegee and mop pan | Custodial Supplies | 46.86 |
| Check | 09/27/2021 | DBT | Paypal | Lock blok | Instructional Supplies | 32.18 |
| Check | 09/27/2021 | DBT | Center for Collaborative Classro... | SIPPS Challenge level - Learning center | Instructional Supplies | 46.68 |
| Check | 09/27/2021 | DBT | NAMTA | Advertising | Advertising | 75.00 |
| Check | 09/27/2021 | DBT | Amazon.com | 4pack umbrella hat - hand sanitizer dispenser | Instructional Supplies | 73.97 |
| Check | 09/28/2021 | 9270 | Scott C Lindstrom | Staff training - relationships | Contracted Service | 1,000.00 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 09/28/2021 | 9268 | Velazquez Flying Carpet Man | Carpet cleaning | Housekeeping Services | 70.00 |
| Check | 09/29/2021 | DBT | Costco | 2 doormats | Kitchen and garden | 19.98 |
| Check | 09/29/2021 | DBT | Costco | Post-its | Office Supplies | 16.49 |
| Check | 09/29/2021 | DBT | Costco | Snacks | Food (Instructional) | 179.38 |
| **TOTAL** | | | | | | **27,339.86** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Budget Committee Member Addition**

**Date:** October 21, 2021

---

**SUMMARY**

The bylaws of the Board of Directors state that the Board shall approve members of the Budget Committee.

**DISCUSSION**

The School Charter reads:

### 20.1 Procedure for the Development of the Annual Budget

The annual budget will be developed by a Budget Committee that will include, at a minimum, the school Director and Treasurer of the Board of Directors. Additional committee members will be added as needed. Recommendations will be approved by the Board of Directors prior to acceptance.

Board Chair Russell Shapiro was approved for the Fiscal Committee at the September meeting. A member of the Fiscal Committee may serve on the Budget Committee as well.

**ACTION REQUESTED:** Approve Molly Makel and Russell Shapiro as members of the Budget Committee.

SHERWOOD MONTESSORI

RESOLUTION NO. 102121

RESOLUTION REGARDING TELECONFERENCED BOARD OF DIRECTORS MEETINGS DRAFT

WHEREAS, Sherwood Montessori is committed to preserving and nurturing public access and participation in meetings of the Board of Directors; and

WHEREAS, all meetings of Sherwood Montessori's legislative bodies are open and public, as required by the Ralph M. Brown Act (Cal. Gov. Code 54950 – 54963), so that any member of the public may attend, participate, and watch the District's legislative bodies conduct their business; and

WHEREAS, the Brown Act, Government Code section 54953(e), makes provisions for remote teleconferencing participation in meetings by members of a legislative body, without compliance with the requirements of Government Code section 54953(b)(3), subject to the existence of certain conditions; and

WHEREAS, a required condition is that a state of emergency is declared by the Governor pursuant to Government Code section 8625, proclaiming the existence of conditions of disaster or of extreme peril to the safety of persons and property within the state caused by conditions as described in Government Code section 8558; and

WHEREAS, a proclamation is made when there is an actual incident, threat of disaster, or extreme peril to the safety of persons and property within the jurisdictions that are within Sherwood's boundaries, caused by natural, technological, or human-caused disasters; and

WHEREAS, it is further required that state or local officials have imposed or recommended measures to promote social distancing, or, the legislative body meeting in person would present imminent risks to the health and safety of attendees; and

WHEREAS, such conditions now exist in Sherwood Montessori's area, specifically, a state of emergency has been proclaimed and continues to directly impact the ability of members to meet safely in person due to the COID-19 pandemic; and

WHEREAS, State and local public health officials continue to recommend measures to promote social distancing; and

WHEREAS, the Board of Directors does hereby find that the COVID-19 pandemic, AND, the social distancing orders have caused, and will continue to cause, conditions of peril to the safety of persons within Sherwood Montessori that are likely to be beyond the control of services, personnel, equipment, and facilities of the school, and desires to proclaim a local emergency and ratify the proclamation of state of emergency by the Governor of the State of California; and

WHEREAS, as a consequence of the local emergency, the Board of Directors does hereby find that the legislative bodies of Sherwood Montessori shall conduct their meetings without compliance with paragraph (3) of subdivision (b) of Government Code section 54953, as authorized by subdivision (e) of section 54953, and that such legislative bodies shall comply with the requirements to provide the public with access to the meetings as prescribed in paragraph (2) of subdivision (e) of section 54953; and

WHEREAS, Sherwood Montessori's Board of Directors has provided and shall continue to provide noticed access to Board meetings via Internet-based and/or telephone-based teleconferencing platforms.

NOW, THEREFORE, THE BOARD OF DIRECTORS OF SHERWOOD MONTESSORI DOES HEREBY RESOLVE AS FOLLOWS:

Section 1. Recitals. The Recitals set forth above are true and correct and are incorporated into this Resolution by this reference.

Section 2. Proclamation of Local Emergency. The Board hereby proclaims that a local emergency now exists throughout the District, meeting in person would present imminent risk.

Section 3. Ratification of Governor's Proclamation of a State of Emergency. The Board hereby ratifies the Governor of the State of California's Proclamation of State of Emergency.

Section 4. Remote Teleconference Meetings. The Director, staff, and legislative bodies of Sherwood Montessori are hereby authorized and directed to take all actions necessary to carry out the intent and purpose of this Resolution including, conducting open and public meetings in

accordance with Government Code section 54953(e) and other applicable provisions of the Brown Act.

Section 5. Effective Date of Resolution. This Resolution shall take effect immediately upon its adoption.

PASSED AND ADOPTED by the Board of Directors of Sherwood Montessori this 21st day of October, 2021, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, November 18, 2021 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00 p.m.)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA** (6:05 p.m.)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, October 21, 2021.

**B.2 MOU with HomeTech Charter** Consider approval of a Memorandum of Understanding between Sherwood Montessori and HomeTech Charter for ELPAC testing.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**B.3 Contract with Know Thyself for Professional Development** Consider approval of contract with Know Thyself for Montessori training.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications**

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**

**E.3 Action Items** (6:40)

**E.3.1 Educator Effectiveness Block Grant** The Board will discuss the draft of the Educator Effectiveness Block Grant.
**Action Requested: Discuss Educator Effectiveness Block Grant**

**F. FUTURE AGENDA ITEMS** (7:00)

The Board will be asked to approve the Educator Effectiveness Grant .

**G. ADJOURNMENT** (7:10)

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

SHERWOOD MONTESSORI

**REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS**

**Meeting ID:** Join Zoom Meeting
https://us02web.zoom.us/j/83528842617?pwd=dVN0YTBITXhRSWYveFk4SkJRelA2Zz09

Meeting ID: 835 2884 2617
Passcode: dTwBR5
One tap mobile
+16699006833,,83528842617#,,,,,,0#,,578950# US (San Jose)
+13462487799,,83528842617#,,,,,,0#,,578950# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 301 715 8592 US (Germantown)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
Meeting ID: 835 2884 2617
Passcode: 578950
Find your local number: https://us02web.zoom.us/u/kb7GYUNKp2

Date/Time: **Thursday, October 21, 2021 – 6:00 p.m.**

## MINUTES

### A. CALL TO ORDER

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*Meeting was called to order at 6:03, all members present.*

### B. CONSENT AGENDA

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, September 16, 2021.

**B.2 Approval of Prop 39 Facilities Request** Consider approval of Prop 39 Request for Facilities.

**B.3 Approval of Contract with Mandelbaum Consulting** Consider approval of a contract with Mandelbaum Consulting.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**B.4 Unaudited Actuals** Accept the Business Manager's Unaudited Actuals Report.

*Consent agenda presented by Russell Shapiro. Discussion followed. Robyn Howley motioned for approval, Karey Cooper seconded motion with unanimous Board approval.*

## C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

## D. NOTICED PUBLIC HEARINGS

**None**

## E. REGULAR BUSINESS

### E.1 Items Removed from Consent (If any)

### E.2 Reports and Communications

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**

*Michelle Yezbick presented Instructional Staff Report and School Directors report. Discussion followed, during which Michelle Yezbick specifically addressed Jessi Lusardi's report with an update regarding her struggles in the classroom. Pat Casey presented the Treasurer's report and Michelle Yezbick presented the SMPO report. Discussion followed.*

### E.3 Action Items

**E.3.1 Budget Committee** The Board will consider approval of Budget Committee members.

*Michelle Yezbick requests approval of additional Budget Committee members, Molly Makel and Russell Shapiro. Discussion followed. Dan LaBar motioned for approval, Robyn Howley seconded, and the Board unanimously approved.*

**E.4 Board Governance**

**F.4.1 Resolution 102121** The Board will consider passing a resolution to implement the provisions of AB 361, the Brown Act Emergency Teleconferencing Extension Bill.

*Russell Shapiro presented Resolution 102121. Discussion followed. Karey Cooper motioned for approval with Dan LaBar seconding the motion. The Board unanimously approved the resolution.*

## F. FUTURE AGENDA ITEMS

The Board will be asked to adopt the First Interim Budget.

## G. ADJOURNMENT

*The meeting was adjourned at 6:54 by Russell Shapiro.*

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **MOU between HomeTech and Sherwood**

**Date:** November 18, 2021

---

**SUMMARY**

HomeTech needs to file a MOU with the CDE to ensure they will have an Enlgish Language Proficiency Assessments for California (ELPAC) evaluator if needed.

**DISCUSSION**

HomeTech Charter in Paradise, a K-12 technology-based personalized learning charter school, currently has no English learners enrolled, and has not had any English learners enrolled in many years. However, if an English learner enrolled in their small school, they would need to have the student take an initial ELPAC. The MOU for consideration ensures that Sherwood can provide these services for HomeTech as HomeTech has no staff members trained to administer the test.

The MOU will cover costs for Sherwood without generating extra revenue and is typical of the MOUs charters in Butte County use to cooperate with sharing needed services.

**ACTION REQUESTED**

Approve MOU.

Attachment: Draft of MOU with HomeTech

**Memorandum of Understanding between**
**Sherwood Montessori and HomeTech Charter**
DRAFT

This memorandum of understanding ("MOU" or "Agreement") is between Sherwood Montessori and HomeTech Charter which are referred to as the "parties".

**RECITALS:**

A. Sherwood is a charter school authorized by Chico Unified School District.

B. HomeTech is a charter school authorized by the Paradise Unified School District.

C. HomeTech wishes to contract with Sherwood for Sherwood's provision of English Language Proficiency Assessment for California (ELPAC) testing services to Home Tech students, as more fully discussed in this MOU.

**NOW, THEREFORE,** in consideration of the promises and the mutual covenants and agreements herein set forth, the parties do hereby agree as follows:

**1. Purpose**

The purpose of the MOU is to ensure that HomeTech students are provided with ELPAC testing services by Sherwood.

**2. Services of the ELPAC testing may include:**

(a) Conducting ELPAC initial and summative assessments for students for whom English is not the primary language by a trained examiner;

(b) Communicating results with HomeTech;

(c) Providing preliminary test results;

(d) Conducting assessment with safety procedures described by the *CAASPP and ELPAC: Physical Distancing Guidelines* memorandum from the California Technical Assistance Center (CalTAC).

(e) Maintaining, protecting and managing confidential electronic and written student records.

**3. Additional HomeTech Obligations** HomeTech

shall:

(a) Pay Sherwood for services identified herein, consistent with the Fiscal Agreement set forth in paragraph 5 below.

(b) Provide Sherwood personnel with appropriate designated workspace for the delivery of services within HomeTech buildings as assigned.

(c) Provide internet data connections in workspaces designated for Sherwood personnel at the HomeTech site.

(d) Provide Sherwood staff and HomeTech students with PPE to maintain a safe testing environment.

(e) Provide workspaces adequate to achieve physical distance described by the *CAASPP and ELPAC: Physical Distancing Guidelines* memorandum from the CalTAC.

## 4. Dispute Resolution

In the event that either party disputes the meaning of the terms of this agreement, the parties shall attempt to resolve the dispute in good faith first through a joint meeting of their representatives. If an agreement cannot be reached through the joint meeting, then the parties agree to attempt to resolve the dispute in a meeting with a moderator agreed upon by both parties.

## 5. Fiscal Agreement

Sherwood will bill HomeTech upon completion of services, at the rate of:

- Breakdown of costs for ELPAC examiner:

  a. HomeTech will be billed at the employee's hourly salary and benefits rate, currently $70.00, plus a 2% administrative fee based on the hourly amounts.

  b. The flat hourly rate will include all benefit cost of the employee, including PERS, payroll fees and other fees associated with an employee. No additional benefits fee will be charged.

- Mileage rate equal to the IRS Standard Mileage Rates, if applicable.

- 2% Administrative Fee based upon the salary and benefit rates listed above.

- Total current hourly rate: $71.40

HomeTech has thirty (30) days from the date of billing to issue payment to Sherwood.

**8. Agreement / Term**

(a) This MOU constitutes the entire understanding between parties and supersedes any prior or concurrent agreement, oral or written, between or among Sherwood and/or HomeTech concerning its subject matter. Any modification to this MOU shall be effective only if in writing and signed by all parties. If any provision or any part of this MOU is for any reason held to be invalid or unenforceable or contrary to public policy, law, or statute, and/or ordinance, the remaining provisions of this MOU shall not be affected thereby and shall remain valid and fully enforceable.

(b) The term of this Agreement and services shall commence on July 1, 2021 and continue through June 30, 2022.

(c) This Agreement has been made and entered into the State of California and the laws of said State will govern the validity and interpretation of this Agreement.

(d) The persons signing this MOU warrant that they are duly authorized to sign it on behalf of the persons and entities being bound.

(e) This Agreement may be executed in counterparts, all of which, taken together, shall be deemed an original.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the date and year first above written.

**On Behalf of HomeTech Charter**

Date: _____ By:_____

HomeTech Charter

**On Behalf of Sherwood Montessori**

Date:_____ _____

Director, Sherwood Montessori

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Contract between Know Thyself and Sherwood Montessori**

**Date:** November 18, 2021

---

**SUMMARY**

School Director is seeking approval of a contract to provide teacher professional development.

**DISCUSSION**

Expenditure of federal funds requires contracts be board approved. To comply with this requirement, approval of the board for three professional development sessions with a Montessori trainer.

**ACTION REQUESTED**

Approve contact.

Attachment: Draft of contract with Know Thyself Inc.

KNOWTHYSELF INC.

**Knowthyself Inc. CONTRACTOR AGREEMENT**

**THIS CONTRACTOR AGREEMENT (the "Agreement") dated this 1st day of November 2021**

**BETWEEN:**

Sherwood Montessori

**- AND -**

Koren Clark of KnowThyself Inc

**BACKGROUND:**

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

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

1. **Services Provided**
2. The Customer hereby agrees to engage the Contractor to provide the Customer with services (the "Services") consisting of:
    1. A two part intensive Mathematics ( Moving Montessori Forward) session. (Feb 3rd, Feb 24th 2021)
    2. ABAR session: Montessori By Any Means Necessary (March 24th)
3. **Term of Agreement**
4. The term of this Agreement (the "Term") will begin on the date of this Agreement and will remain in full force and effect until the completion of the Services, subject to earlier termination as provided in this Agreement. The Term of this Agreement may be extended by mutual written agreement of the Parties.

5. **Performance**
6. The Parties agree to do everything necessary to ensure that the terms of this Agreement take effect.
7. **Currency**
8. Except as otherwise provided in this Agreement, all monetary amounts referred to in this Agreement are in USD (US Dollars).
9. **Compensation**
10. For the services rendered by the Contractor as required by this Agreement, the Customer will provide compensation (the "Compensation") to the Contractor of $3600.00
11. The Compensation will be payable, while this Agreement is in force, according to the following payment terms:
    1. payment of $1800 before the services are rendered and ½ payment of $1800 due after services are rendered.
12. **Ownership of Materials and Intellectual Property**

    All intellectual property and related material (the "Intellectual Property") including any related work in progress that is developed or produced under this Agreement, will be the property of the Koren Clark from “KnowThyself Inc.”.

13. Title, copyright, intellectual property rights and distribution rights of the Intellectual Property remain exclusively with the Contractor.
14. **Return of Property**
15. Upon the expiry or termination of this Agreement, the Contractor will return to the Customer any property, documentation, records, or confidential information which is the property of the Customer.
16. **Notice**
17. All notices, requests, demands or other communications required or permitted by the terms of this Agreement will be given in writing and delivered to the Parties of this Agreement as follows:
    1. Sherwood Montessori
    2. 
    3. 1010 Cleveland Ave, Chico, CA 95928

4. Fax: (_____) _____-_____
5. Email:michelle@sherwoodmontessori.org
6. Koren Clark
7. 3640 Shone Ave
8. Oakland, California, 94605
9. Fax: (_____) _____-_____
10. Email: knowthyselfinc@gmail.com

18. or to such other addresses as any Party may from time to time notify the other.
19. **Dispute Resolution**
20. In the event a dispute arises out of or in connection with this Agreement, the Parties will attempt to resolve the dispute through friendly consultation.
21. If the dispute is not resolved within a reasonable period then any or all outstanding issues may be submitted to mediation in accordance with any statutory rules of mediation. If mediation is unavailable or is not successful in resolving the entire dispute, any outstanding issues will be submitted to final and binding arbitration in accordance with the laws of the State of California. The arbitrator's award will be final, and judgment may be entered upon it by any court having jurisdiction within the State of California.
22. **Modification of Agreement**
23. Any amendment or modification of this Agreement or additional obligation assumed by either Party in connection with this Agreement will only be binding if evidenced in writing signed by each Party or an authorized representative of each Party.
24. **Entire Agreement**

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

26. **Waiver**

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

KNOWTHYSELF INC.

**IN WITNESS WHEREOF** the Parties have duly affixed their signatures under hand and seal on this 10th day of August 2020.

Sherwood Montessori(Customer)

_____

_____

_____

Koren Clark of Knowthyself Inc.
(Contractor)

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Instructional Staff Report**

**Date:** November 18, 2021

---

***Instructional Staff was asked to respond to the questions:*** *How did parent/teacher conferences go?*

**Transitional Kindergarten/Kindergarten -Teresa Shippen**

One of the most important things we do as teachers is to meet with parents for parent teacher conferences. This year, I was able to meet with all but one family during our conference week. We met in person, on zoom and of course in person and on zoom. This time allows us to find out more about our students and families. Aside from sharing the usual things such as the progress we see, our concerns and goals for the students and samples of work, we are given time to listen to our families. This year many of my families expressed a desire to get involved and volunteer. Some were concerned with finding time that would not take them away from their work, while others were hoping to join us in class and assist in a variety of ways. Last year, due to the pandemic, we were unable to welcome parent volunteers in our room. While I don't have a strong need for regular help, I am welcoming parents in for special projects such as music instruction, field trips and special craft days. Over the years I have noticed that these opportunities give parents a time to bond and become a stronger support group for the school. I feel very lucky to have a group of parents who are willing to help out in this way. I'm looking forward to providing these opportunities and seeing the many ways these families will add to the richness of our school. I appreciate the willingness of this group of parents, both in taking the time to meet and in finding a way to be a part of their student's learning environment.

**1st/2nd -Kim Powers**

Overall, parent-teacher conferences were wonderful! I enjoyed meeting with all my kids' parents. Most everyone seems to be very invested in their students' academics and well-being. I think I have a very supportive group of parents in my class. I really appreciated hearing about things happening at home that inform some of the behaviors that I see in class. It's nice to know that there are real reasons for some of the behaviors that I don't have control over. It might have been difficult for some parents to share some of those things, but I really appreciated that level of trust they felt they could have with me. I also appreciated that parents were willing to communicate with me about specific things I have been asking about, for example homework. I have been requesting feedback regarding homework and I really appreciated all the parents who

told me what they needed or wanted in that area. I was able to conference with all but one parent, and I felt accomplished and supported in that endeavor. Many thanks to all the families in my class who made it a priority to meet with me during conferences!

**1st/2nd/3rd -Marlo Knox**

I'm preparing this report after it's due date, in the midst of a family health crisis. It's an excellent topic and worthy of discussion and reflection. Thank you for identifying such meaningful aspects of our work, the relationship between the teacher and the parent/caregiver.
I had the pleasure of meeting with every family with a child enrolled in my class at the time parent/teacher conferences were scheduled. Conferences are traditionally scheduled for 30 minutes. I opened each conference allowing families to bring up topics that they want to make sure are discussed during our time together. I prepared a document for each student identifying my observations of their gifts, areas for growth, assessment results, and summarized my overall impressions of how each student was doing at this point of the school year. Consistently, the families that I serve demonstrate a deep love and respect for their children. I found families encouraging of my own work as a lead teacher. For my part, a sincere partnership was solidified by sitting together and pausing to reflect on who each child is, was, and has the desire to become. I feel confident speaking directly and honestly with the parents in my classroom and trust they feel the same. It is an invaluable time, and the stories of each child's life amaze, set one to wonder, inspire, and remind me why I love what I do.

It would be wonderful to have a week following conferences to put into place all items discussed during this valuable time. For example, some families are interested in homework, volunteering, intervention, special assessments of concerns, social/emotional support. These items take planning, emails, paperwork, not impossible, but daunting on top of instructional planning. In a Montessori classroom particularly getting lessons out on how to use materials allow for independence, a cherished Montessori practice and important life skill. This year I am keeping that goal, using the materials primary to my work. Around this, I fit in all I can.
If you find yourself with more questions, comments, or concerns please do not hesitate to reach out to me so that I can continue this important discussion.

**1st/2nd /3rd -Anne Adams**

I was thankful for a strong turnout at our recent round of parent-teacher conferences. I was able to have a conference with a parent or guardian for all but one of the students on my roster. (More students have joined our classroom since then, so the process of family outreach and communication continues.)

Here are some comments I heard more than twice:

**"Our child loves school."**
This has been delightful to hear, and interesting, because I've noticed it doesn't always come from students who act like satisfied customers. I wonder if, owing to all of the Covid closures,

kids are realizing that school is a service and a privilege, and not taking it so much for granted anymore.

**"Our child has started singing all the time."**
Again, this comment does not always correspond with students who sing in the classroom, indicating some kids are quietly memorizing our classroom songs, then choosing to entertain themselves or their families with them later. Songs give such an accessible impression of poetry and language, they're such a wonderful aide to memorization, and they're one of the only things a person can bring with them absolutely anywhere. If you can sing to yourself, you can entertain yourself, and that's very empowering.

**"Our child has started to draw a lot at home."**
I'll be frank: I limit drawing in the classroom. I've found that I have to be assertive about what we do and don't draw during class, or our work time quickly dissolves into play. That said, I'm introducing techniques for careful drawing and design, and reminding students that they can draw more freely whatever they choose (cartoon characters, etc.) on their own time. I'm happy to hear that they're remembering that they have this option at home, and that they're using their free time for self-entertainment and skill building.

**"There's something you should know about our child's personal/home-life circumstances…"**
These can be hard conversations, and I appreciate parents' and guardians' bravery when they broach sensitive subjects in order to better inform me. Some children in our community have experienced serious losses, disappointments, and setbacks already--at the beginning of their life journey. I can't take away students' prior suffering, but at least if I'm informed I can adjust my approach to try to meet them where they are emotionally.

Overall, I'm impressed with the Sherwood parent community's willingness to show up, share, try, and trust. I look forward to knowing them better.

**4th /5th/6th -Jessi Lusardi**

**4th /5th /6th-April Pearce**

Parent teacher conferences went well. I was able to meet with nearly every family during conference week and connected with others in the weeks before and after. I have known many of the parents for years because I had their children in younger grades. It was great to reconnect with them. It also felt good to get to know the folks who are new to my classroom. I always feel like I know the kids better after talking with their parents. They expressed having a better idea of what goes on at school after talking with me.

Many parents expressed concerns about their child's mental well-being. Some have found services outside of school and others were thankful we have a wellness counselor available on campus. I think it is important we have mental health support services available at school and hope this can continue in the years to come.

**7th/8th-Michael Whittemore**

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** November 18, 2021

---

**Administrative**

- Updated enrollment will be reported at the meeting.
- Maribel De La Cerda has been hired as a Reading Intervention Instructor. She is implementing the Montessori Reading Remediation Pathways program which uses Montessori methods and materials to teach a strong phonics base to reading instruction.
- We are currently hiring a paraprofessional aide for a 1:1 student support position due to the current employee moving out of the area.
- I have been working on our collection of Montessori materials to sort, purge, organize, label and stored them for ease of access for our teachers.
- I have been giving Montessori lessons in the Upper Elementary class that Jessi Lusardi is teaching since Sheng Vang's resignation. They are a great group of kids, and lessons that I love, so it has been a pleasure.
- We have had Nurtured Heart Approach training for both certificated and classified staff. Our trainer also made a consulting visit for a teacher who requested it.
- With Measure K funds we were able to purchase another set of library shelves for our library at 1010. The library is being set up to include a music instruction area in the back, with multiple copies texts teachers use for literacy instruction shelved in this area. We are excited to be back to setting up our library and science lab/art room after the disruption of the pandemic.
- I met with Sherwood Montessori Parents Organization (SMPO) leaders to discuss options of venues for our Winter Performance. It is most likely we will hold the event at the Neighborhood Church at the end of Notre Dame, but we are exploring other options as well.
- Several teachers and I are taking a self-paced training course with over 11 hours of content titled "Positive Discipline in the Montessori Classroom". The course instructors are Dr. Jane Nelsen, co-founder of Positive Discipline and a licensed Marriage and Family Therapist, and Chip DeLorenzo, an experienced Montessori educator with 25-years of experience in various positions from lead guide to head of school and Positive Discipline facilitator.

- I was able to recently attend a BAMA JEDI event. Translation: Bay Area Montessori Association /justice, equity, diversity and inclusion. Dr. Luz Casquejo Johnston, Assistant Professor in the Kalmanovitz School of Education (KSOE) at Saint Mary's was the presenter. She teaches in the Montessori Teacher Education Program and serves as the Elementary Coordinator.
- We had a fun day wearing costumes at school on Friday, October 29th. You can see us "shaking it all about" with our Hokey Pokey tradition if you check out our Facebook page.

**Safety**

- Our Positive Behavior Interventions and Supports (PBIS) program team is having monthly meetings to look at data on behavior incidents to determine what supports are needed for individual students, teachers, and the school's procedures.
- Illness has had a significant impact on student and staff attendance. The disruption of COVID on education has proven to continue into its third year as a result. We have been able to cover these absences for teachers and staff only by using our substitute staff and creativity!

**Legislative/Legal/Compliance**

- Pat and I had our first meeting with Barbara Mandelbaum regarding compliance with state and federal programs. It was made very clear that accepting federal funds comes with more reporting and compliance work that is sustainable for our school.
- I attended a webinar on legal issues related to charters presented by Young, Minney and Corr and Ed Tech on November 10th. I learned information important for maximizing our funding determinations.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Treasurer's Report**

**Date:** November 18, 2021 Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of October 2021 reconciled with and matched those of the school's internal reports. The New Balance totaled $ 804,281.87 as of October 31, 2021 for the checking account and $50,000 in the special account which can now be moved back to the checking account since contract work at 1010 Cleveland was completed and signed off by the county.
- There were no unexpected high-cost expenses in September.

Profit & Loss

- The October Profit & Loss report shows a Net Income of -$166,486 which is offset by October LCF funds totaling $61,595 deposited in November along with Title I, ESSA funds of $6,927 and Lottery funds of $9,105.

Cash Flow

- Assuming all Federally allocated funds are received and P1 is at least 100 ADA, the school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Balance Sheet - Current Month
**Accrual Basis** — **As of October 31, 2021**

| | Oct 31, 21 |
|---|---|
| **ASSETS** | |
| **Current Assets** | |
| **Checking/Savings** | |
| **9100-Assets** | 869,763 |
| **Total Checking/Savings** | 869,763 |
| **Accounts Receivable** | |
| **9200-Accounts Receivable** | 53,152 |
| **Total Accounts Receivable** | 53,152 |
| **Other Current Assets** | |
| **9290 - Due from Grantor Govts.** | -27,068 |
| **9340-Security Deposit** | 50,000 |
| **Total Other Current Assets** | 22,932 |
| **Total Current Assets** | 945,846 |
| **Fixed Assets** | |
| **9410 - Land** | 95,000 |
| **9430- Building** | 182,515 |
| **9435-Accumulated Depreciation** | -21,786 |
| **Total Fixed Assets** | 255,729 |
| **TOTAL ASSETS** | **1,201,575** |
| **LIABILITIES & EQUITY** | |
| **Liabilities** | |
| **Current Liabilities** | |
| **Accounts Payable** | |
| **9500-Accounts Payable** | 8,000 |
| **Total Accounts Payable** | 8,000 |
| **Credit Cards** | |
| **SHERWOOD COSTCO VISA** | 2,629 |
| **Total Credit Cards** | 2,629 |
| **Other Current Liabilities** | |
| **9500-Liabilities** | 147,014 |
| **Total Other Current Liabilities** | 147,014 |
| **Total Current Liabilities** | 157,643 |
| **Total Liabilities** | 157,643 |
| **Equity** | |
| **Restricted Assets** | 364,551 |

| | Oct 31, 21 |
|---|---|
| **Unassigned/Unaapproriated** | 845,867 |
| **Net Income** | -166,486 |
| **Total Equity** | 1,043,932 |
| **TOTAL LIABILITIES & EQUITY** | **1,201,575** |

# Sherwood Montessori
## Profit & Loss YTD Comparison
### July through October 2021

| | Jul - Oct 21 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 388,868 |
| **Total Income** | 388,868 |
| **Gross Profit** | 388,868 |
| **Expense** | |
| **1000 Certificated Salaries** | 188,000 |
| **2000 Classified Salaries** | 131,654 |
| **3000-Employee Benefits** | 103,002 |
| **4000-Books and Supplies** | 45,305 |
| **5000 Services/Other Op. Exp.** | 87,393 |
| **Total Expense** | 555,354 |
| **Net Ordinary Income** | -166,486 |
| **Net Income** | **-166,486** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**October 2021**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Che... | 10/01/202 | EFT | Laura Swanson | Big life journal | Instructional Supplies | 10.61 |
| Che... | 10/01/202 | EFT | T Mobile Hot Spot | August Hotspot | Wifi - Distance Learning | 149.94 |
| Che... | 10/01/202 | EFT | PG & E | September service | Electricity | 750.77 |
| Cre... | 10/02/202 | | Costco | Annual renewal | 5300-Dues and Members... | 180.00 |
| Che... | 10/03/202 | DBT | TJ MAXX | Ipad charger | Instructional Supplies | 19.28 |
| Che... | 10/04/202 | ACH | CharterSAFE | 21-22 P&L PREMIUM 1 | 5400-Liability Insurance | 2,641.00 |
| Che... | 10/04/202 | ACH | CharterSAFE | 21-22 WC PREMIUM 1 | 3601-Workers Comp | 752.00 |
| Che... | 10/04/202 | 9252 | TIAA Commercial Finance, ... | OCTOBER | Copier Lease | 286.03 |
| Che... | 10/04/202 | DBT | Amazon.com | Face masks | Instructional Supplies | 142.56 |
| Che... | 10/04/202 | DBT | NCS Pearson INC. | Q-Global Video Proctoring su... | 4100-Textbooks/Core Cur... | 149.00 |
| Che... | 10/04/202 | DBT | Indeed | Ad | Advertising | 11.67 |
| Che... | 10/05/202 | DBT | Center for Collaborative Cla... | SIPPS Symposium | Instructional Supplies | 50.00 |
| Che... | 10/06/202 | EFT | California Water Service C... | September service | Water | 38.40 |
| Che... | 10/06/202 | EFT | Comcast 4454 | SEPTEMBER-OCTOBER SE... | Internet Service Provider | 211.45 |
| Che... | 10/06/202 | 9271 | Chico Country Day | NATALIE WREN - NURSE -I... | Contracted Service | 1,242.47 |
| Che... | 10/06/202 | 9275 | Richard Hirshen | Kitchen groceries | Kitchen and garden | 115.49 |
| Che... | 10/06/202 | 9275 | Richard Hirshen | September hours - 30.75x35$ | Contracted Service | 210.00 |
| Che... | 10/06/202 | 9275 | Richard Hirshen | August hours - 6x35$ | Contracted Service | 1,076.25 |
| Che... | 10/06/202 | DBT | Growing up Chico | INV 000161 | Advertising | 760.00 |
| Che... | 10/06/202 | DBT | Lowe's | Supplies | Maintenance Supplies | 128.61 |
| Che... | 10/06/202 | DBT | Amazon.com | Battleship with planes strateg... | Extended Day | 74.83 |
| Che... | 10/07/202 | DBT | Amazon.com | 2 pounds sand - over the doo... | Extended Day | 32.13 |
| Che... | 10/07/202 | DBT | Amazon.com | Prang thick core colored pen... | Instructional Supplies | 55.11 |
| Che... | 10/07/202 | DBT | Amazon.com | Supplies RM | Instructional Supplies | 61.06 |
| Che... | 10/08/202 | 9276 | Advanced Document | September service | Copier Lease | 746.59 |
| Che... | 10/08/202 | 9277 | Museum of Northern Califor... | Sheng field trip | Field Trips and Assemblies | 55.50 |
| Che... | 10/08/202 | 9277 | Museum of Northern Califor... | April field trip | Field Trips and Assemblies | 55.50 |
| Che... | 10/08/202 | 9280 | CUSD | AUGUST FUA | CUSD FUA Charges | 1,985.09 |
| Che... | 10/08/202 | DBT | Pearson Education Inc. | RM | 4100-Textbooks/Core Cur... | 658.16 |
| Cre... | 10/10/202 | | Microsoft | Subscription | Software Licensing | 6.50 |
| Cre... | 10/10/202 | | Microsoft | Subscription | Software Licensing | 11.10 |
| Che... | 10/11/202 | EFT | Waste Management | SEPTEMBER SERVICE | Trash/Recycling | 128.68 |
| Che... | 10/12/202 | DBT | PANERA BREAD | Lunch - Meeting | Food - Meetings | 44.48 |
| Che... | 10/12/202 | DBT | ARCO PUMPPASS | Gas cards | SELPA | 100.00 |
| Che... | 10/12/202 | DBT | Learning A-Z | Science A-Z | Software Licensing | 108.00 |
| Che... | 10/12/202 | DBT | Growing up Chico | INV 000182 - OCT/NOV/DEC... | Advertising | 200.00 |
| Che... | 10/12/202 | DBT | Waseca | Waseca boxes | Instructional Supplies | 445.00 |
| Che... | 10/12/202 | DBT | Amazon.com | 24 pack plastic jar storage co... | Extended Day | 20.37 |
| Che... | 10/12/202 | DBT | Amazon.com | Washable school clear liquid ... | Extended Day | 20.87 |
| Che... | 10/12/202 | DBT | Northern Speech Services | Kaufman treatment kit #1 an... | Instructional Supplies | 231.55 |
| Che... | 10/12/202 | DBT | Facebook Ads | Ad | Advertising | 25.00 |
| Che... | 10/13/202 | DBT | Home Depot | Garden supplies | Kitchen and garden | 136.05 |
| Che... | 10/13/202 | DBT | Amazon.com | guinea pig cage - rabbit cage | Instructional Supplies | 39.56 |
| Che... | 10/13/202 | DBT | Safeway | Snacks | Food (Instructional) | 50.02 |
| Che... | 10/13/202 | DBT | Amazon.com | Hepa replacement filter | PPE | 124.36 |
| Che... | 10/13/202 | DBT | IKEA | RM | Instructional Supplies | 74.31 |
| Che... | 10/14/202 | DBT | Sutherland Landscape Cen... | One yard of walk-on bark | Kitchen and garden | 353.05 |
| Che... | 10/14/202 | DBT | Office Depot | Tape - Pen - Ready index | Office Supplies | 178.76 |
| Che... | 10/14/202 | DBT | Costco | Food for nutrition | Instructional Supplies | 333.34 |
| Che... | 10/15/202 | DBT | Walmart | Bissel vaccuum | Instructional Supplies | 170.53 |
| Che... | 10/15/202 | DBT | Amazon.com | Mesh laundry bag | Instructional Supplies | 15.00 |
| Che... | 10/15/202 | DBT | Amazon.com | 5 gallon red biohazard bags | PPE | 7.26 |
| Che... | 10/15/202 | ACH | COSTCO VISA CARD | SEPTEMBER-OCTOBER PU... | SHERWOOD COSTCO V... | 5,148.10 |
| Che... | 10/16/202 | DBT | Learning A-Z | RAZ - Plus renewal | Software Licensing | 216.00 |
| Che... | 10/16/202 | DBT | Amazon.com | Draft office stamp | Office Supplies | 10.45 |
| Che... | 10/18/202 | 8281 | Marta Taylor | Pumpkins | Fundraising Expenses | 34.50 |
| Che... | 10/18/202 | 8283 | KIM POWERS | Alfalfa for guinea pigs - Salt/fl... | Instructional Supplies | 25.83 |
| Che... | 10/18/202 | 8283 | KIM POWERS | Pastels for art - Michael | Instructional Supplies | 12.85 |
| Che... | 10/18/202 | 8284 | Matt P. McLaughlin | Psych Service - August 2021 | SELPA | 220.00 |
| Che... | 10/18/202 | 8285 | Office Depot | Easel pad - Paper - Pencil | Office Supplies | 141.40 |
| Che... | 10/18/202 | 8288 | Lassen Park Foundation | Return unused grant funds | 8699-Field Trip Donations | 1,000.00 |
| Che... | 10/18/202 | EFT | Comcast Business 9110 | OCTOBER-NOVEMBER | Internet Service Provider | 291.38 |
| Che... | 10/18/202 | EFT | Verizon Wireless | SEP-OCT | Telephone, Cellular | 99.99 |
| Che... | 10/18/202 | EFT | PG & E | SEP-OCT | Electricity | 574.50 |
| Che... | 10/18/202 | DBT | Amazon.com | 100 masks | PPE | 51.46 |
| Che... | 10/18/202 | DBT | TEA BAR CAFE | Meal for staff training | Food - Meetings | 69.94 |
| Che... | 10/18/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Che... | 10/18/202 | DBT | Wufoo | OCTOBER SERVICE | Online List Management | 19.00 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Che... | 10/18/202 | DBT | Facebook Ads | Ad | Advertising | 25.00 |
| Che... | 10/18/202 | DBT | Amazon.com | RM | Instructional Supplies | 105.09 |
| Che... | 10/18/202 | DBT | Amazon.com | RM | Instructional Supplies | 105.09 |
| Che... | 10/19/202 | DBT | Amazon.com | 2000 masks | PPE | 214.49 |
| Che... | 10/19/202 | DBT | Amazon.com | Montessori boards - math an... | Extended Day | 192.78 |
| Che... | 10/19/202 | DBT | Teachers Pay Teachers | Montessori 4th great story bu... | Instructional Supplies | 6.00 |
| Che... | 10/19/202 | DBT | Teachers Pay Teachers | Montessori 5th great story bu... | Instructional Supplies | 10.00 |
| Che... | 10/19/202 | DBT | USPS | Mailing | Postage | 8.80 |
| Che... | 10/19/202 | DBT | AbeBooks.com | BOOKS - RM | 4100-Textbooks/Core Cur... | 10.53 |
| Cre... | 10/19/202 | | Classroom Mechanics | Positive discipline in the Mon... | Instructional Supplies | 1,590.00 |
| Che... | 10/19/202 | 9285 | Office Depot | INV2524376831 | Office Supplies | 141.40 |
| Che... | 10/20/202 | 8286 | Office Depot | Surge protector - Marker - Pe... | Office Supplies | 75.42 |
| Che... | 10/20/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Che... | 10/20/202 | DBT | Costco | Food - snacks | Food (Instructional) | 364.91 |
| Che... | 10/20/202 | DBT | Costco | Food - snacks | Food (Instructional) | 25.56 |
| Che... | 10/20/202 | DBT | Tractor Supply CO | tarps for garden | Instructional Supplies | 85.79 |
| Che... | 10/20/202 | DBT | Walmart | 53 Q touch - trash can | Instructional Supplies | 20.63 |
| Che... | 10/20/202 | DBT | Montessori Research and ... | BCE / CE timeline banner | Instructional Supplies | 100.01 |
| Che... | 10/20/202 | 9286 | Office Depot | inv2525875971 | Office Supplies | 75.42 |
| Che... | 10/21/202 | DBT | Amazon.com | Equipment bag - PE | LCAP | 24.22 |
| Che... | 10/21/202 | DBT | Pro Imprint | Print Service | Advertising | 349.30 |
| Che... | 10/21/202 | ACH | HP LEASE 7603 | Lease Payment - Customer I... | HP DIRECT LEASE | 316.21 |
| Che... | 10/23/202 | DBT | Costco | Doormat | Office Supplies | 16.08 |
| Che... | 10/25/202 | DBT | Law Offices of Young, Minn... | Webinar - Charter leadership... | Attorney | 60.00 |
| Che... | 10/25/202 | DBT | Express Drain Cleaning | Snaked and cleaned the mai... | Contracted Service | 436.00 |
| Che... | 10/25/202 | DBT | LA COCINA | The VE Team meetings | Food - Meetings | 2.87 |
| Che... | 10/25/202 | DBT | Amazon.com | Prime subscription | Instructional Supplies | 13.93 |
| Che... | 10/26/202 | 8287 | Office Depot | Index cards - Paper - Stapler | Office Supplies | 73.38 |
| Che... | 10/26/202 | DBT | Amazon.com | Thermal laminating pouches | Instructional Supplies | 61.77 |
| Che... | 10/26/202 | DBT | Amazon.com | Hanging file folder organizer ... | Instructional Supplies | 27.56 |
| Che... | 10/26/202 | DBT | PANERA BREAD | PBIS Team meeting | Food - Meetings | 49.34 |
| Che... | 10/26/202 | DBT | DEVELOPMENTAL STUDI... | Alameda CA - RM | Instructional Supplies | 50.00 |
| Che... | 10/27/202 | DBT | AbeBooks.com | RM | Instructional Supplies | 17.64 |
| Che... | 10/27/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Che... | 10/27/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Che... | 10/27/202 | DBT | Costco | Kitchen bags, cups, and door... | Custodial Supplies | 391.47 |
| Che... | 10/27/202 | DBT | STAPLES | Hanging file - Glue | Instructional Supplies | 76.59 |
| Che... | 10/27/202 | DBT | Amazon.com | RM | Instructional Supplies | 17.37 |
| Che... | 10/27/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Che... | 10/27/202 | DBT | STAMP-N-STORAGE | RM | Contracted Service | 152.14 |
| Che... | 10/28/202 | EFT | Laura Swanson | Tenga for group | Instructional Supplies | 10.67 |
| Che... | 10/28/202 | EFT | Laura Swanson | Oct supervision by Maia Illa | Contracted Service | 320.00 |
| Che... | 10/28/202 | EFT | Heather Fisher | mileage | 5200-Travel and Conferen... | 22.40 |
| Che... | 10/28/202 | EFT | California Water Service C... | October service | Water | 38.40 |
| Che... | 10/28/202 | DBT | IXL | Math, Language arts, Scienc... | 5300-Dues and Members... | 27.95 |
| Che... | 10/29/202 | EFT | Heather Fisher | mileage | 5200-Travel and Conferen... | 30.69 |
| Che... | 10/29/202 | DBT | N2Y LLC | Unique learning system | SELPA | 1,146.01 |
| Che... | 10/29/202 | DBT | Amazon.com | Adjustable bed furniture risers | Instructional Supplies | 26.80 |
| Bill | 10/31/202 | 2021... | Pat Casey | OCTOBER CONTRACT SER... | Business Manager Services | 4,000.00 |
| **TOTAL** | | | | | | **34,804.40** |

To:Board of Directors

From: Marta Taylor, SMPO Public Relations Coordinator
Subject: Sherwood Montessori Parents Organization

Report Date: November 18, 2021

Sherwood Montessori held its first restaurant takeover event, Woodstock's Pizza hosted our event and it's giving back $118.87, SMPO leaders will pick up the check next week.

Megan (event coordinator) secured el Rey Theater for our winter performance, el Rey wanted to rent us the venue for $2,500 which was out of our budget. Megan communicated to them we had to pass for budget reasons and they gave us an extra non-profit discount. We secured the venue for $2,000! It will also be great advertisement for our school to have Sherwood Montessori on the marquee and in downtown. El Rey Theater will also run their concessions in which the school will have no profit off.

The Winter Performance planning committee is thinking of new ways to meet overhead expenses. As for having a raffle and donation jar.

At The last minute I thought of the new ice rink we will have in Chico. I thought it would be a fun and new idea to have a fundraiser there. I'm waiting to hear back from the park recreation. Fingers crossed!

Best regards,

SMPO

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Educator Effectiveness Grant Plan**

**Date:** November 18, 2021

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**SUMMARY**

The school's plan for the Educator Effectiveness funds (EEF) needs to be heard in a public meeting of the governing board before its adoption in a subsequent public meeting. This must take place on or before December 30, 2021.

**DISCUSSION**

Sherwood has been allocated $44,934; allocations are based on the number of staff working for the school in October, 2020. Funds may be expended during the 2021–22, 2022–23, 2023–24, 2024–25 and 2025–26 fiscal years.

Funds can be expended for any of the following purposes:

1. Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction.

2. Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas.

3. Practices and strategies that reengage pupils and lead to accelerated learning.

4. Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.

5. Practices to create a positive school climate.

6. Strategies to improve inclusive practices.

7. Instruction and education to support implementing effective language acquisition programs for English learners.

8. New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of subdivision (c).

9. Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to EC Section 51226.7 into pupil instruction for grades 7 to 12, inclusive.

10. Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.

**ACTION REQUESTED**

Discuss spending plan.

Attachments: Draft of Educator Effectiveness Grant spending plan

# Educator Effectiveness Block Grant 2021

| Local Educational Agency (LEA) Name | Contact Name and Title | Email and Phone |
|---|---|---|
| Sherwood Montessori | Michelle Yezbick, Director | michelle@sherwoodmontessori.org<br>(530) 345-6600 |

| Total amount of funds to be received by the LEA: | Date of Public Meeting prior to adoption: | Date of adoption at public meeting: |
|---|---|---|
| $44,934.00 | November 18, 2021 | December 16, 2021 |

EC 41480

(a)(2) A school district, county office of education, charter school, or state special school may expend the funds received pursuant to this subdivision from the 2021–22 fiscal year to the 2025–26 fiscal year, inclusive. School districts, county offices of education, charter schools, and state special schools **shall coordinate the use of any federal funds received under Title II of the federal Every Student Succeeds Act of 2015 (Public Law 114–95) to support teachers and administrators with the expenditure of funds received pursuant to this subdivision.**

(b) A school district, county office of education, charter school, or state special school shall expend funds apportioned pursuant to this section to provide professional learning for **teachers, administrators, paraprofessionals who work with pupils, and classified staff that interact with pupils**, with a focus on any of the following areas:

**(1) Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction, including, but not limited to, coaching and mentoring solutions that address a local need for teachers that can serve all pupil populations with a focus on retaining teachers, and offering structured feedback and coaching systems organized around social-emotional learning, including, but not limited to, promoting teacher self-awareness, self-management, social awareness, relationships, and responsible decision-making skills, improving teacher attitudes and beliefs about one's self and others, and supporting learning communities for educators to engage in a meaningful classroom teaching experience.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Mentor stipend for teacher clearing their credential | 1,800.00 | 1,800.00 | 1,800.00 | 1,800.00 | 1,800.00 | 9,000 |
| **Subtotal** | **1,800.00** | **1,800.00** | **1,800.00** | **1,800.00** | **1,800.00** | **9,000** |

**(2) Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas, including English language arts, history-social science, science, technology, engineering, mathematics, and computer science.**

| **Planned Activity** | **Budgeted 2021-22** | **Budgeted 2022-23** | **Budgeted 2023-24** | **Budgeted 2024-25** | **Budgeted 2025-26** | **Total Budgeted per Activity** |
|---|---|---|---|---|---|---|
| Sherwood Montessori will implement the STAR Reading and STAR Math Renaissance Learning assessment system to be used as a baseline assessment and formative assessment three times yearly.<br><br>The Purpose of the Formative Assessment System is:<br>* To establish a baseline for student learning<br>* To assess for student learning<br>* To monitor student learning trajectory<br>* To provide the student and teacher with immediate feedback<br>* To support a focus on students' strengths and stretches<br>* To inform teacher decision-making; and to motivate students<br><br>Teachers use the Assessment data to: | 3384.00 | 3384.00 | 3384.00 | 3384.00 | 3384.00 | 16,920 |

| | | | | | | |
|---|---|---|---|---|---|---|
| * Drive instruction, design curriculum and set learning targets with students<br>* Make informed decisions for meeting the learning needs of all students<br>* Share student data with parents to encourage parent support and involvement<br>All curriculum decisions and recommendations are formed from the learning progressions students make on both formative and summative assessments. The assessments also guide budgetary decisions related to the purchase of supplementary curriculum and additional student support. | | | | | | |
| **Subtotal** | **3384.00** | **3384.00** | **3384.00** | **3384.00** | **3384.00** | **16,920** |

**(3) Practices and strategies that reengage pupils and lead to accelerated learning.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| In addition to budgeted activities related to reengaging pupils and accelerated learning in both the Expanded Learning Opportunities Grant and the ESSER III Grant Plans, Sherwood will implement Montessori Reading Pathways. | 1,500 | 750 | 750 | 750 | 750 | 3,750 |
| **Subtotal** | **1,500** | **750** | **750** | **750** | **750** | **3,750** |

**(4) Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| A schoolwide Garden program will be integrated into the core instruction across all subject areas in order to provide social emotional support and improve student engagement, morale and well-being. | 2,000 | 1,000 | 1,000 | 1,000 | 1,000 | 6,000 |
| **Subtotal** | **2,000** | **1,000** | **1,000** | **1,000** | **1,000** | **6,000** |

**(5) Practices to create a positive school climate, including, but not limited to, restorative justice, training around implicit bias, providing positive behavioral supports, multitiered systems of support, transforming a schoolsite's culture to one that values diverse cultural and ethnic backgrounds, and preventing discrimination, harassment, bullying, and intimidation based on actual or perceived characteristics, including disability, gender, gender identity, gender expression, language, nationality, race or ethnicity, religion, or sexual orientation.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Sherwood Montessori will focus on creating a positive school climate and culture through the following activities:<br><br>PBIS training for teachers and staff<br>PBIS celebrations for promoting positive choices from students | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 5,000 |
| **Subtotal** | **1,000** | **1,000** | **1,000** | **1,000** | **1,000** | **5,000** |

**(6) Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Sherwood Montessori will be participating in the SUMS (Scale-up MTSS Statewide) MTSS (Multi-tiered System of Support) Phase 3 grant opportunity to address this area. | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Subtotal** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** |

**(7) Instruction and education to support implementing effective language acquisition programs for English learners, which may include integrated language development within and across content areas, and building and strengthening capacity to increase bilingual and biliterate proficiency.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Sherwood Montessori has budgeted activities related to English Language Learners in the LCAP. | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Subtotal** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** |

**(8) New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of subdivision (c).**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| | | | | | | |
| **Subtotal** | | | | | | |

**(9) Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to Section 51226.7 into pupil**

**instruction for grades 7 to 12, inclusive.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Sherwood will purchase ethnic studies curricula and support teacher training to implement it with grades 7-8. | 2,000 | 1,000 | 500 | 500 | 500 | 4,500 |
| **Subtotal** | **2,000** | **1,000** | **500** | **500** | **500** | **4,500** |

**(10) Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| No Planned Activities funded by the EEBG plan | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Subtotal** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** |

## Summary of Expenditures

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| **Subtotal Section (1)** | 1,800.0 | 1,800.00 | 1,800.00 | 1,800.00 | 1,800.00 | 9,000 |
| **Subtotal Section (2)** | 3384.00 | 3384.00 | 3384.00 | 3384.00 | 3384.00 | 16,920 |
| **Subtotal Section (3)** | 1,500 | 750 | 750 | 750 | 750 | 3,750 |
| **Subtotal Section (4)** | 2,000 | 1,000 | 1,000 | 1,000 | 1,000 | 6,000 |
| **Subtotal Section (5)** | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 5,000 |
| **Subtotal Section (6)** | 0.0 | 0.00 | 0.00 | 0.00 | 0.00 | 0 |
| **Subtotal Section (7)** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

| | | | | | | |
|---|---|---|---|---|---|---|
| **Subtotal Section (8)** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Subtotal Section (9)** | 2,000 | 1,000 | 500 | 500 | 500 | 4,500 |
| **Subtotal Section (10)** | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Totals by year** | **11,684** | **8,934** | **8,434** | **8,434** | **8,434** | **45,170** |

| **Total planned expenditures by the LEA:** |
|---|
| $45,170.00 |

**Note:**
Per EC 41480 (d)(2): On or before September 30, 2026, the LEA must report detailed expenditure information to the California Department of Education, including, but not limited to: specific purchases made; the number of the following educators who received professional development: Teachers, Administrators, Paraprofessional educators, and Classified staff.

SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, December 16, 2021 – 6:00 p.m.**

**AGENDA**

**A. CALL TO ORDER** (6:00 p.m.)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA** (6:05 p.m.)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, November 18, 2021.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6:20)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 School Director Report**
**E.2.2 Treasurer Report**
**E.2.3 SMPO Report**

**E.3 Action Items** (6:40)

**E.3.1 Educator Effectiveness Block Grant** The Board will adopt the draft of the Educator Effectiveness Block Grant.
**Action Requested:** Adopt Educator Effectiveness Block Grant**.**

**E.3.2 First Interim Budget** The Board will adopt the draft of the Educator Effectiveness Block Grant.
**Action Requested:** Adopt First Interim Budget.

**E.3.3 Revision of Transitional Kindergarten Policy** The Board will consider a revision of the current Transitional Kindergarten Policy
**Action Requested:** Approve revision.

**F. Closed Session CONFERENCE WITH LEGAL COUNSEL – Potential Litigation (Gov't. Code section 54956.9(d)(4).)**

**G. FUTURE AGENDA ITEMS** (7:05)

The Board will be asked to recieve the School Accountability Report Card (SARC).

**H. ADJOURNMENT** (7:10)

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SHERWOOD MONTESSORI

**REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH
Date/Time: **Thursday, November 18, 2021 – 6:00 p.m.**

## Minutes

### A. CALL TO ORDER

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*Meeting called to order by Russell Shapiro at 6:02p.m. Russell Shapiro, Beth Hammer, Dan LeBar and Robyn Howley present, Karey Cooper absent.*

### B. CONSENT AGENDA

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, October 21, 2021.
**B.2 MOU with HomeTech Charter** Consider approval of a Memorandum of Understanding between Sherwood Montessori and HomeTech Charter for ELPAC testing.
**B.3 Contract with Know Thyself for Professional Development** Consider approval of contract with Know Thyself for Montessori training.

*Consent agenda presented by Russell Shapiro, discussion followed. Beth Hammer motioned for approval, Robyn Howley seconded. Motion passed unanimously by present Board members*

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**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)
Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS**

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications**
*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**

*Michelle Yezbick presented the Instructional Staff Report and School Director Report. Pat Casey presented the Treasurer Report. SMPO report was provided by Michelle Yezbick. Reports were reviewed and discussed by the Board.*

**E.3 Action Items**

**E.3.1 Educator Effectiveness Block Grant** The Board will discuss the draft of the Educator Effectiveness Block Grant.
**Action Requested: Discuss Educator Effectiveness Block Grant**

*Michelle Yezbick presented the Educator Effectiveness Block Grant.*
*Discussion followed.*

**F. FUTURE AGENDA ITEMS**

The Board will be asked to approve the Educator Effectiveness Grant .

**G. ADJOURNMENT**

*The Board meeting was adjourned at 6:50 by Russel Shapiro.*

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SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** November 18, 2021

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**Administrative**

- Updated enrollment will be reported at the meeting.
- Teachers have been giving mid-year assessments and are reporting seeing student growth since the beginning of the school year.
- We are currently fully staffed after hiring Marta Taylor for our paraprofessional aide position and Lauren Inthavong for an opening in the Extended Day program.
- Teachers have been working on selecting Essential Standards for English Language Arts from the California State Standards. These are not the only standards the teachers will plan instruction for, but rather the emphasized standards. Report card revisions are being considered to reflect student progress in these specific standards.
- Our Winter Performance will have happened by this meeting's time, currently students and staff are busy working on their presentations.
- We had a successful Kindergarten Open House on Tuesday, December 7th. Parents who attended had great questions for Teresa, our teacher, while the children who attended were busy with the engaging activities she had prepared for them.
- On November 30 we had our second of four Town Hall meetings with topics including: vaccination mandates and exemptions, potential expansion of TK, upcoming events and parent involvement and volunteer opportunities. Parents participated and were engaged, and in the interactive part of the meeting we had a genuine discussion of race and how it plays out in education. I'm proud to work at a school where we can have dialogue about important and sensitive topics that lead to practices that make a better future for all our children.

**Safety**

- Heather Fisher, my Administrative Assistant, has been taking the lead on COVID testing. She was able to order take-home test kits for students and families to use over the break to test before they return to school. Heather acted fast, and we have already received the kits although the supply ran out before all California schools and districts were able to get their orders filled.

**Legislative/Legal/Compliance**

- Barbara Mandelbaum contacted me to let me know that all is well in terms of Sherwood being eligible for Title 1 funds. Qualifying for these funds ensures that we will receive Elementary and Secondary School Emergency Relief, or ESSER, funds. Other news from the California Department of Education was that because there is an anticipated budget surplus, Sherwood will likely be eligible for other funding that will be distributed to Title 1 schools.
- I attended a webinar with content regarding major initiatives funded in the 2021 Budget Act titled *Transforming Education in California.* The virtual event was a collaboration between School Services of California, Inc., the California Collaborative for Educational Excellence, and the Small School District Association. Topics included the Expanded Learning Opportunities Program, the expansion of Transitional Kindergarten, and Community Schools.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Agenda Item , Treasurer's Report**

**Date:** December 16, 2021 Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of November 2021 reconciled with and matched those of the school's internal reports. The New Balance totaled $ 894,409.89 as of November 30, 2021 for the checking account and $50,000 in the special account which will moved back to the checking account once the contract work at 1010 Cleveland is signed off by the county.
- There were no unexpected high-cost expenses in November.

Profit & Loss

- The November Profit & Loss report shows a Net Income of -$282,759 which is offset by November LCF funds totaling $61,696 deposited in December along with ELOP funds of $27,500.

Cash Flow

- Assuming all Federally allocated funds are received and P1 is at least 100 ADA, the school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Balance Sheet - Current Month
**Accrual Basis** — As of November 30, 2021

| | Nov 30, 21 |
|---|---|
| **ASSETS** | |
| **Current Assets** | |
| **Checking/Savings** | |
| **9100-Assets** | 848,515 |
| **Total Checking/Savings** | 848,515 |
| **Accounts Receivable** | |
| **9200-Accounts Receivable** | 5,338 |
| **Total Accounts Receivable** | 5,338 |
| **Other Current Assets** | |
| **9290 - Due from Grantor Govts.** | -45,215 |
| **9340-Security Deposit** | 50,000 |
| **Undeposited Funds** | -5,338 |
| **Total Other Current Assets** | -553 |
| **Total Current Assets** | 853,300 |
| **Fixed Assets** | |
| **9410 - Land** | 95,000 |
| **9430- Building** | 182,515 |
| **9435-Accumulated Depreciation** | -21,786 |
| **Total Fixed Assets** | 255,729 |
| **TOTAL ASSETS** | **1,109,029** |
| **LIABILITIES & EQUITY** | |
| **Liabilities** | |
| **Current Liabilities** | |
| **Accounts Payable** | |
| **9500-Accounts Payable** | 12,000 |
| **Total Accounts Payable** | 12,000 |
| **Credit Cards** | |
| **SHERWOOD COSTCO VISA** | 5,013 |
| **Total Credit Cards** | 5,013 |
| **Other Current Liabilities** | |
| **9500-Liabilities** | 164,357 |
| **Total Other Current Liabilities** | 164,357 |
| **Total Current Liabilities** | 181,370 |

| | Nov 30, 21 |
|---|---|
| **Total Liabilities** | 181,370 |
| **Equity** | |
| **Restricted Assets** | 364,551 |
| **Unassigned/Unaapproriated** | 845,867 |
| **Net Income** | -282,759 |
| **Total Equity** | 927,659 |
| **TOTAL LIABILITIES & EQUITY** | **1,109,029** |

# Sherwood Montessori
## Profit & Loss YTD Comparison
July through November 2021

| | Jul - Nov 21 | Jul - Nov 20 | Jul - Nov 21 |
|---|---|---|---|
| **Ordinary Income/Expense** | | | |
| **Income** | | | |
| **8000-Revenues** | 451,821 | 505,414 | 451,821 |
| **Total Income** | 451,821 | 505,414 | 451,821 |
| **Gross Profit** | 451,821 | 505,414 | 451,821 |
| **Expense** | | | |
| **1000 Certificated Salaries** | 248,944 | 166,307 | 248,944 |
| **2000 Classified Salaries** | 178,471 | 110,978 | 178,471 |
| **3000-Employee Benefits** | 132,466 | 90,949 | 132,466 |
| **4000-Books and Supplies** | 51,130 | 33,183 | 51,130 |
| **5000 Services/Other Op. E...** | 123,569 | 116,765 | 123,569 |
| **Total Expense** | 734,581 | 518,181 | 734,581 |
| **Net Ordinary Income** | -282,759 | -12,768 | -282,759 |
| **Net Income** | **-282,759** | **-12,768** | **-282,759** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**November 2021**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Che... | 11/01/202 | DBT | JUNK KING | Junk removal | Trash/Recycling | 188.00 |
| Che... | 11/01/202 | DBT | Amazon.com | Big magnetic sentence strips | Instructional Supplies | 20.79 |
| Che... | 11/01/202 | DBT | Amazon.com | RM | Instructional Supplies | 10.71 |
| Che... | 11/01/202 | EFT | HSA Bank | OCTOBER 2021 | HSA - K. POWERS | 100.00 |
| Che... | 11/02/202 | 9261 | TIAA Commercial Finance, ... | NOVEMBER | Copier Lease | 243.63 |
| Che... | 11/02/202 | DBT | 1 & 1 Internet Inc. | Internet hosting | Website, Hosting | 45.00 |
| Che... | 11/02/202 | DBT | Indeed | Ad | Advertising | 50.00 |
| Che... | 11/03/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 200.00 |
| Che... | 11/03/202 | DBT | Costco | Ziploc bags | Office Supplies | 16.49 |
| Che... | 11/03/202 | DBT | Costco | Snacks | Food (Instructional) | 316.48 |
| Che... | 11/03/202 | 9292 | Hernandez Cleaning Service | INV 30170 | Housekeeping Services | 5,250.00 |
| Che... | 11/03/202 | EFT | Comcast 4454 | OCTOBER-NOVEMBER SE... | Internet Service Provider | 214.44 |
| Che... | 11/03/202 | EFT | T Mobile Hot Spot | October Hotspot | Wifi - Distance Learning | 180.00 |
| Che... | 11/03/202 | ACH | CharterSAFE | 21-22 P&L PREMIUM 5 | 5400-Liability Insurance | 2,641.00 |
| Che... | 11/03/202 | ACH | CharterSAFE | 21-22 WC PREMIUM 5 | 3601-Workers Comp | 752.00 |
| Che... | 11/04/202 | DBT | Office Depot | Tote file | Instructional Supplies | 42.88 |
| Che... | 11/04/202 | DBT | Office Depot | Supplies | Office Supplies | 106.82 |
| Che... | 11/05/202 | DBT | Secretary of State-CA | CORP FILE FEE | 5300-Dues and Members... | 20.00 |
| Che... | 11/05/202 | DBT | Facebook Ads | RM | Advertising | 19.98 |
| Che... | 11/06/202 | DBT | HP LEASE 7603 | Lease Payment - Customer I... | HP DIRECT LEASE | 316.21 |
| Che... | 11/08/202 | 9293 | Richard Hirshen | Planning, shopping, kitchen o... | Kitchen and garden | 350.00 |
| Che... | 11/08/202 | 9294 | E-rate Advisors | INV - 1428 - 2nd Q | Contracted Service | 375.00 |
| Che... | 11/08/202 | 9295 | Advanced Document | INV 58045 | Copier Lease | 1,104.25 |
| Che... | 11/08/202 | 9296 | Richard Hirshen | Food for class and Farmer's ... | Kitchen and garden | 74.34 |
| Che... | 11/08/202 | 9297 | JOY DUGGAN | Paper for class | Instructional Supplies | 8.57 |
| Che... | 11/08/202 | 9298 | Molly Makel | 1 year subscription to BASC-... | Contracted Service | 65.00 |
| Che... | 11/08/202 | 9299 | California Charter Schools ... | 1 year membership thru 6-30... | 5300-Dues and Members... | 1,060.00 |
| Che... | 11/08/202 | 9300 | TIAA Commercial Finance, ... | NOVEMBER - Balance of pa... | Copier Lease | 46.64 |
| Che... | 11/08/202 | EFT | Heather Fisher | Lunch UE/MS | Food - Meetings | 65.79 |
| Che... | 11/08/202 | DBT | Cool School Studios | Student health cumulative re... | Office Supplies | 86.22 |
| Che... | 11/08/202 | DBT | Woodstocks Pizza | Pizza | Food - Meetings | 70.08 |
| Che... | 11/08/202 | DBT | STAPLES | Whiteboard cleaner, gel pens... | Instructional Supplies | 42.64 |
| Cre... | 11/08/202 | | Center for Collaborative Cla... | SIPPS Beginning level 4th ed... | 4100-Textbooks/Core Cur... | 1,959.26 |
| Che... | 11/08/202 | DBT | MATH GAMES | | Instructional Supplies | 90.00 |
| Che... | 11/08/202 | DBT | Premier Access Dental | | 3401-Health Benefits | 332.82 |
| Che... | 11/09/202 | DBT | Home Depot | 4 metal wire shelves | Office Supplies | 246.57 |
| Che... | 11/09/202 | DBT | SUPER DUPER | SPEECH/LANGUAGE SELPA | Instructional Supplies | 24.91 |
| Cre... | 11/09/202 | | Microsoft | Subscription | Software Licensing | 6.50 |
| Che... | 11/10/202 | EFT | Waste Management | OCTOBER SERVICE | Trash/Recycling | 128.68 |
| Che... | 11/10/202 | 9303 | Chico Country Day | NATALIE WREN - NURSE -I... | Contracted Service | 1,242.47 |
| Che... | 11/10/202 | 9302 | Steve Duke | Tape, screws, keys, rope, pic... | Maintenance Supplies | 79.15 |
| Che... | 11/10/202 | DBT | Amazon.com | Sheet protectors | Office Supplies | 14.03 |
| Che... | 11/12/202 | 9291 | Comcast Ethernet | Amount to pay RE E-rate adv... | 5900-Communications | 998.57 |
| Che... | 11/12/202 | DBT | Costco | Snacks | Food (Instructional) | 262.05 |
| Che... | 11/15/202 | DBT | WINCO FOODS | Snacks | Food (Instructional) | 8.57 |
| Che... | 11/15/202 | DBT | Secretary of State-CA | CORP FILE FEE | 5300-Dues and Members... | 20.00 |
| Che... | 11/16/202 | 9304 | Comcast Ethernet | Balance due | 5900-Communications | 2,995.72 |
| Che... | 11/16/202 | DBT | Amazon.com | 2 pack of grabber reacher tool | Office Supplies | 22.51 |
| Che... | 11/16/202 | DBT | Lowe's | Blinds and paint | Maintenance Supplies | 919.30 |
| Che... | 11/16/202 | DBT | Amazon.com | Replacement blades for shar... | Instructional Supplies | 7.50 |
| Che... | 11/16/202 | DBT | PANERA BREAD | RM | Food - Meetings | 39.85 |
| Che... | 11/16/202 | DBT | Amazon.com | Supplies - Returned | Instructional Supplies | 51.63 |
| Che... | 11/16/202 | ACH | COSTCO VISA CARD | OCTOBER-NOVEMBER PU... | SHERWOOD COSTCO V... | 197.60 |
| Che... | 11/17/202 | 9305 | Comcast Ethernet | September service | 5900-Communications | 5,451.05 |
| Che... | 11/17/202 | DBT | Wufoo | NOVEMBER SERVICE | Online List Management | 19.00 |
| Che... | 11/17/202 | DBT | California Charter Schools ... | Annual membership ID-A-03... | 5300-Dues and Members... | 1,060.00 |
| Che... | 11/17/202 | DBT | Amazon.com | RM | Instructional Supplies | 8.57 |
| Che... | 11/18/202 | 7230 | Terra Dudley | refund on year book | 8699-Other Local Income | 15.00 |
| Che... | 11/18/202 | 7231 | Brooke Waits | refund on year book | 8699-Other Local Income | 15.00 |
| Che... | 11/18/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Che... | 11/18/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Che... | 11/18/202 | ACH | HP LEASE 7603 | Lease Payment - Customer I... | HP DIRECT LEASE | 316.21 |
| Che... | 11/18/202 | DBT | Amazon.com | RM | Instructional Supplies | 22.81 |
| Che... | 11/18/202 | DBT | Amazon.com | RM | Instructional Supplies | 28.82 |
| Che... | 11/19/202 | 9306 | Jacqueline Lacefield | Livescan | LiveScan and TB Test Ser... | 64.00 |
| Che... | 11/19/202 | 9307 | KIM POWERS | Art materials | Instructional Supplies | 142.74 |
| Che... | 11/19/202 | 9308 | Butte County Tax Collector | 1010 CLEVELAND AVENUE ... | Property Tax | 19.86 |
| Che... | 11/19/202 | EFT | Jessica Lusardi | Supplies | Instructional Supplies | 189.85 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Che... | 11/19/202 | EFT | Heather Fisher | Mileage | 5200-Travel and Conferen... | 32.85 |
| Che... | 11/19/202 | EFT | PG & E | October service | Electricity | 272.53 |
| Che... | 11/19/202 | EFT | Comcast Business 9110 | NOVEMBER-DECEMBER | Internet Service Provider | 305.78 |
| Che... | 11/19/202 | EFT | Verizon Wireless | November service | Telephone, Cellular | 99.99 |
| Che... | 11/23/202 | DBT | Amazon.com | Amazon Prime Membership | 5300-Dues and Members... | 13.93 |
| Che... | 11/24/202 | DBT | Amazon.com | Fire extinguisher sign | Maintenance Supplies | 69.47 |
| Che... | 11/30/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 50.00 |
| Che... | 11/30/202 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 50.00 |
| Che... | 11/30/202 | DBT | Amazon.com | 10 minute sand timer | Instructional Supplies | 15.65 |
| Che... | 11/30/202 | DBT | Amazon.com | Spike ball replacement balls | LCAP | 21.42 |
| Che... | 11/30/202 | DBT | Amazon.com | 3 spike ball game sets | LCAP | 225.09 |
| Che... | 11/30/202 | 9311 | Hernandez Cleaning Service | INV 30175 | Housekeeping Services | 3,750.00 |
| Che... | 11/30/202 | 9312 | North State Parent Magazine | INV 71730 | Advertising | 435.00 |
| Cre... | 11/30/202 | | TEA BAR CAFE | Planning lunch | Food - Meetings | 77.21 |
| Cre... | 11/30/202 | | Mendes Supply Co. | Supplies | Custodial Supplies | 538.21 |
| Bill | 11/30/202 | 2021... | Pat Casey | NOVEMBER 2021 CONTRA... | Business Manager Services | 4,000.00 |
| Che... | 11/30/202 | | | Service Charge | Bank Fees | 27.00 |
| **TOTAL** | | | | | | **41,267.69** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Educator Effectiveness Grant Plan**

**Date:** December 16, 2021

---

**SUMMARY**

The school's plan for the Educator Effectiveness funds (EEF) needs to be heard in a public meeting of the governing board before its adoption in a subsequent public meeting by December 30, 2021. The plan was presented and discussed at the November Regular Meeting of the Board of Directors and should be adopted at this meeting.

**DISCUSSION**

Sherwood has been allocated $44,934; allocations are based on the number of staff working for the school in October, 2020. Funds may be expended during the 2021–22, 2022–23, 2023–24, 2024–25 and 2025–26 fiscal years.

Funds can be expended for any of the following purposes:

1. Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction.

2. Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas.

3. Practices and strategies that reengage pupils and lead to accelerated learning.

4. Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.

5. Practices to create a positive school climate.

6. Strategies to improve inclusive practices.
7. Instruction and education to support implementing effective language acquisition programs for English learners.

8. New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of subdivision (c).

9. Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to EC Section 51226.7 into pupil instruction for grades 7 to 12, inclusive.

10. Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.

**ACTION REQUESTED**

Adopt spending plan.

Attachments: Draft of Educator Effectiveness Grant spending plan

# Educator Effectiveness Block Grant 2021

| Local Educational Agency (LEA) Name | Contact Name and Title | Email and Phone |
|---|---|---|
| Sherwood Montessori | Michelle Yezbick, Director | michelle@sherwoodmontessori.org<br>(530) 345-6600 |

| Total amount of funds to be received by the LEA: | Date of Public Meeting prior to adoption: | Date of adoption at public meeting: |
|---|---|---|
| $44,934.00 | November 18, 2021 | December 16, 2021 |

EC 41480

(a)(2) A school district, county office of education, charter school, or state special school may expend the funds received pursuant to this subdivision from the 2021–22 fiscal year to the 2025–26 fiscal year, inclusive. School districts, county offices of education, charter schools, and state special schools **shall coordinate the use of any federal funds received under Title II of the federal Every Student Succeeds Act of 2015 (Public Law 114–95) to support teachers and administrators with the expenditure of funds received pursuant to this subdivision.**

(b) A school district, county office of education, charter school, or state special school shall expend funds apportioned pursuant to this section to provide professional learning for **teachers, administrators, paraprofessionals who work with pupils, and classified staff that interact with pupils**, with a focus on any of the following areas:

**(1) Coaching and mentoring of staff serving in an instructional setting and beginning teacher or administrator induction, including, but not limited to, coaching and mentoring solutions that address a local need for teachers that can serve all pupil populations with a focus on retaining teachers, and offering structured feedback and coaching systems organized around social-emotional learning, including, but not limited to, promoting teacher self-awareness, self-management, social awareness, relationships, and responsible decision-making skills, improving teacher attitudes and beliefs about one's self and others, and supporting learning communities for educators to engage in a meaningful classroom teaching experience.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Mentor stipend for teacher clearing their credential | 1,800.00 | 1,800.00 | 1,800.00 | 1,800.00 | 1,800.00 | 9,000 |
| **Subtotal** | **1,800.00** | **1,800.00** | **1,800.00** | **1,800.00** | **1,800.00** | **9,000** |

**(2) Programs that lead to effective, standards-aligned instruction and improve instruction in literacy across all subject areas, including English language arts, history-social science, science, technology, engineering, mathematics, and computer science.**

| **Planned Activity** | **Budgeted 2021-22** | **Budgeted 2022-23** | **Budgeted 2023-24** | **Budgeted 2024-25** | **Budgeted 2025-26** | **Total Budgeted per Activity** |
|---|---|---|---|---|---|---|
| Sherwood Montessori will implement the STAR Reading and STAR Math Renaissance Learning assessment system to be used as a baseline assessment and formative assessment three times yearly.<br><br>The Purpose of the Formative Assessment System is:<br>* To establish a baseline for student learning<br>* To assess for student learning<br>* To monitor student learning trajectory<br>* To provide the student and teacher with immediate feedback<br>* To support a focus on students' strengths and stretches<br>* To inform teacher decision-making; and to motivate students<br><br>Teachers use the Assessment data to: | 3384.00 | 3384.00 | 3384.00 | 3384.00 | 3384.00 | 16,920 |

| | | | | | | |
|---|---|---|---|---|---|---|
| * Drive instruction, design curriculum and set learning targets with students<br>* Make informed decisions for meeting the learning needs of all students<br>* Share student data with parents to encourage parent support and involvement<br>All curriculum decisions and recommendations are formed from the learning progressions students make on both formative and summative assessments. The assessments also guide budgetary decisions related to the purchase of supplementary curriculum and additional student support. | | | | | | |
| **Subtotal** | **3384.00** | **3384.00** | **3384.00** | **3384.00** | **3384.00** | **16,920** |

**(3) Practices and strategies that reengage pupils and lead to accelerated learning.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| In addition to budgeted activities related to reengaging pupils and accelerated learning in both the Expanded Learning Opportunities Grant and the ESSER III Grant Plans, Sherwood will implement Montessori Reading Pathways. | 1,500 | 750 | 750 | 750 | 750 | 3,750 |
| **Subtotal** | **1,500** | **750** | **750** | **750** | **750** | **3,750** |

**(4) Strategies to implement social-emotional learning, trauma-informed practices, suicide prevention, access to mental health services, and other approaches that improve pupil well-being.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| A schoolwide Garden program will be integrated into the core instruction across all subject areas in order to provide social emotional support and improve student engagement, morale and well-being. | 2,000 | 1,000 | 1,000 | 1,000 | 1,000 | 6,000 |
| **Subtotal** | **2,000** | **1,000** | **1,000** | **1,000** | **1,000** | **6,000** |

**(5) Practices to create a positive school climate, including, but not limited to, restorative justice, training around implicit bias, providing positive behavioral supports, multitiered systems of support, transforming a schoolsite's culture to one that values diverse cultural and ethnic backgrounds, and preventing discrimination, harassment, bullying, and intimidation based on actual or perceived characteristics, including disability, gender, gender identity, gender expression, language, nationality, race or ethnicity, religion, or sexual orientation.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Sherwood Montessori will focus on creating a positive school climate and culture through the following activities:<br><br>PBIS training for teachers and staff<br>PBIS celebrations for promoting positive choices from students | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 5,000 |
| **Subtotal** | **1,000** | **1,000** | **1,000** | **1,000** | **1,000** | **5,000** |

**(6) Strategies to improve inclusive practices, including, but not limited to, universal design for learning, best practices for early identification, and development of individualized education programs for individuals with exceptional needs.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Sherwood Montessori will be participating in the SUMS (Scale-up MTSS Statewide) MTSS (Multi-tiered System of Support) Phase 3 grant opportunity to address this area. | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Subtotal** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** |

**(7) Instruction and education to support implementing effective language acquisition programs for English learners, which may include integrated language development within and across content areas, and building and strengthening capacity to increase bilingual and biliterate proficiency.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Sherwood Montessori has budgeted activities related to English Language Learners in the LCAP. | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Subtotal** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** |

**(8) New professional learning networks for educators not already engaged in an education-related professional learning network to support the requirements of subdivision (c).**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| | | | | | | |
| **Subtotal** | | | | | | |

**(9) Instruction, education, and strategies to incorporate ethnic studies curricula adopted pursuant to Section 51226.7 into pupil**

**instruction for grades 7 to 12, inclusive.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| Sherwood will purchase ethnic studies curricula and support teacher training to implement it with grades 7-8. | 2,000 | 1,000 | 500 | 500 | 500 | 4,500 |
| **Subtotal** | **2,000** | **1,000** | **500** | **500** | **500** | **4,500** |

**(10) Instruction, education, and strategies for certificated and classified educators in early childhood education, or childhood development.**

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| No Planned Activities funded by the EEBG plan | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Subtotal** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** | **0.00** |

## Summary of Expenditures

| Planned Activity | Budgeted 2021-22 | Budgeted 2022-23 | Budgeted 2023-24 | Budgeted 2024-25 | Budgeted 2025-26 | Total Budgeted per Activity |
|---|---|---|---|---|---|---|
| **Subtotal Section (1)** | 1,800.0 | 1,800.00 | 1,800.00 | 1,800.00 | 1,800.00 | 9,000 |
| **Subtotal Section (2)** | 3384.00 | 3384.00 | 3384.00 | 3384.00 | 3384.00 | 16,920 |
| **Subtotal Section (3)** | 1,500 | 750 | 750 | 750 | 750 | 3,750 |
| **Subtotal Section (4)** | 2,000 | 1,000 | 1,000 | 1,000 | 1,000 | 6,000 |
| **Subtotal Section (5)** | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 5,000 |
| **Subtotal Section (6)** | 0.0 | 0.00 | 0.00 | 0.00 | 0.00 | 0 |
| **Subtotal Section (7)** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

| | | | | | | |
|---|---|---|---|---|---|---|
| **Subtotal Section (8)** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Subtotal Section (9)** | 2,000 | 1,000 | 500 | 500 | 500 | 4,500 |
| **Subtotal Section (10)** | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Totals by year** | **11,684** | **8,934** | **8,434** | **8,434** | **8,434** | **45,170** |

| **Total planned expenditures by the LEA:** |
|---|
| $45,170.00 |

**Note:**
Per EC 41480 (d)(2): On or before September 30, 2026, the LEA must report detailed expenditure information to the California Department of Education, including, but not limited to: specific purchases made; the number of the following educators who received professional development: Teachers, Administrators, Paraprofessional educators, and Classified staff.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **First Interim Budget**

**Date:** December 16, 2021

---

**SUMMARY**

Business Manager Pat Casey has prepared a First Interim Financial Report that needs to be adopted by the Board before being sent to CUSD, BCOE, and the CDE.

**DISCUSSION**

The Budget Committee met in November with the original budget for the 2021-2022 fiscal year, current salaries and positions, and cash flow with actual expenditures and revenues for the current fiscal year.

State revenue has decreased because it is now based on an estimated 100 ADA instead of the 145 used in the past three years. The $394,720 decrease is mitigated by new revenue from ELO, IPI, ESSER and Educator Effectiveness grants. The allocation of funds is greater than what is budgeted but until funds are actually received I advise not to include them in the budget.

Expenses for salaries and benefits now include all position additions and deletions and the increase approved in the salary schedules and employee benefits.

Increases in the 4000s object codes now reflect the spending of grant funds that have been received. Changes in the 5000s object codes now reflect estimated cost for P&L insurance and the change from contracting for Independent Contractors to hiring personnel to provide the service (Psychologist, Counselor and MTSS Director).

The net ending balance is projected to be $340,475 assuming no lower than 100 ADA funded by the state.

**ACTION REQUESTED**

Adopt Interim Budget

Attachment: Draft First Interim Budget

| 2021-22 | FUNDING AT 145 ADA | FUNDING AT 100 ADA | | |
|---|---|---|---|---|
| **2021-22 1st INTERIM** | **2021-22 ORIGINAL BUDGET** | **2021-22 1st INTERIM BUDGET** | **CHANGE** | |
| **Revenue** | | | | |
| 8011 Local Control Funding | 754,372 | 463,442 | | |
| 8012 Education Protection Act | 283,407 | 179,156 | | |
| 8096 In Lieu Taxes | 358,445 | 358,906 | | |
| Subtotal LCFF Revenues | ***1,396,224*** | ***1,001,504*** | ***(394,720)*** | |
| 80XX - ELO/IPI 20-21 | 25,000 | 74,000 | 49,000 | |
| 80XX - ELO 21-22 | 20,000 | 50,000 | 30,000 | |
| 80XX - ESSER | 85,989 | 100,000 | 14,011 | |
| 80XX - EDUCATOR EFFECTIVENESS | | 44,934 | 44,934 | |
| 8181 Spec. Educ.- SELPA Fed | 18,125 | 6,000 | (12,125) | |
| 8311 Spec. Educ. - SELPA State | 94,250 | 95,000 | 750 | |
| 8312 Spec. Educ. - SELPA ERMHS | 11,400 | 3,000 | (8,400) | |
| 8550 Mandates Block Grant | 2,475 | 2,500 | 25 | |
| 8560 State Lottery | 30,000 | 35,000 | 5,000 | |
| 8699 Fundraising / Donations | | | - | |
| 8710 Other Local Revenue | | | - | |
| **TOTAL REVENUES** | **1,683,463** | **1,411,938** | ***(271,525)*** | |
| **Expense** | | | | |
| 1000 Certificated Salaries | 633,982 | 562,694 | (71,288) | 34% |
| 2000 Classified Salaries | 433,898 | 455,654 | 21,756 | 28% |
| 3000 Employee Benefits | 305,518 | 300,335 | (5,183) | 18% |
| **SUBTOTAL** | ***1,373,398*** | ***1,318,683*** | (54,715) | 80% |
| 4100 Texts and Core Curricula | 3,000 | 12,000 | 9,000 | |
| 4200 Reference Materials | 3,000 | 3,000 | - | |
| 4300 Materials and Supplies | 24,250 | 50,000 | 25,750 | |
| 4400 NonCap Equipment | 2,000 | 4,000 | 2,000 | |
| 4700 Food (Nutrition) | 500 | 500 | - | |
| **SUBTOTAL** | ***32,750*** | ***69,500*** | 36,750 | 4% |
| 5200 Travel and Conferences | 5,000 | 5,000 | - | |
| 5300 Dues and Memberships | 3,100 | 3,100 | - | |
| 5400 Property/Liability Insurance | 31,000 | 31,000 | - | |
| 5500 Operations / Housekeeping | 67,000 | 67,000 | - | |
| 5600 Rentals, Leases, and Repairs | 12,600 | 12,600 | - | |
| 5800 Prof. & Consulting Services | 145,300 | 120,000 | (25,300) | 4% |
| 5900 Communications | 7,750 | 25,000 | 17,250 | |
| **SUBTOTAL** | ***271,750*** | ***263,700*** | (8,050) | 16% |
| 6200 CAPITAL OUTLAY- BLDG | | | - | |
| **TOTAL EXPENDITURES** | **1,677,898** | **1,651,883** | **(26,015)** | 100% |
| **Net Income** | ***5,565*** | ***(239,945)*** | **ADA Equiv.** | **-24** |
| **Restrictred Grant Funds** | ***50,000*** | | | |
| **Unassigned/Unappropriated - Prior Year** | **354,855** | **360,420** | | |
| **Unassigned/Unappropriated - Proj. Yr End** | **360,420** | **120,475** | | |
| **Reserve - Economic Uncertainties** | **220,000** | **220,000** | **Est. 2 mos. salary/benes.** | |
| **Total - Unassigned/Economic Uncertainty** | **580,420** | **340,475** | **ADA Equiv.** | **34** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Revised Transitional Kindergarten Policy**

**Date:** December 16, 2021

---

**SUMMARY**

It would benefit the school to revise the current Transitional Kindergarten Policy.

**DISCUSSION**

By the 2025-2026 school year, all children who will turn five by September 1st will be eligible to enroll in transitional kindergarten. Each year, the eligibility age range increases:

Between September 2 and December 2 in the 2021-2022 school year

Between September 2 and February 2 in the 2022-2023 school year

Between September 2 and April 2 in the 2023-2024 school year

Between September 2 and June 2 in the 2024-2025 school year

By September 1 in the 2025-2025 school year and beyond.

Students who have birthdays that fall within the eligibility range are fully funded starting on the first day of school.

If there are open spaces in the classroom or classrooms that include transitional kindergarten in any of the years before full implementation, the school could hold a second lottery mid-year to fill those spaces for the remainder of the year. The school will begin receiving funding for those students once they have their fifth birthday.

**ACTION REQUESTED**

Approve policy revisions.

Attachment: Draft of Revised Transitional Kindergarten Policy

SHERWOOD MONTESSORI

Transitional Kindergarten Policy

The Board of Directors of Sherwood Montessori wishes to offer a high-quality, Montessori methods based transitional kindergarten program for families seeking a Montessori education for their young children.

The transitional kindergarten program shall be based on a modified kindergarten curriculum that is age and developmentally appropriate and offers opportunities for each child to reach his or her own potential academically, personally, and socially. As the traditional Montessori curriculum for ages 3-6 develops the whole child intellectually, physically, and psychologically, it will be the foundation for this curriculum. Because the Montessori philosophy embraces multi-age groupings, transitional kindergarten students will be enrolled in a class that includes kindergarten students.

~~Sherwood shall allow children who will have their fifth birthday between September 2 and December 2 to enroll in a transitional kindergarten program in accordance with state law.~~
Enrollment shall follow admission requirements outlined in Sherwood Montessori's Charter (Section 8.0). Exemptions from the lottery that exist in the Charter will be valid for students entering transitional kindergarten. Enrollment in the transitional kindergarten program shall be voluntary.

In accordance with state law, Sherwood shall enroll children who will have their fifth birthday within the designated cut off dates:

- Between September 2 and December 2 in the 2021-2022 school year
- Between September 2 and February 2 in the 2022-2023 school year
- Between September 2 and April 2 in the 2023-2024 school year
- Between September 2 and June 2 in the 2024-2025 school year
- By September 1 in the 2025-2026 school year and beyond.

If enrollment is not full by the end of November in any year before the 2025-2026 school year in the classroom or classrooms housing the transitional kindergarten program, Sherwood may conduct a lottery at 3:00 p.m. on the last day before the Winter Break. Students shall be admitted in order of birthday with oldest given priority to fill the classroom or classrooms for the remainder of the school year.

The number of instructional minutes will meet or exceed the minimum legal requirement.

Teachers assigned to teach in transitional kindergarten classes shall possess a teaching credential or permit that authorizes instruction at the kindergarten grade level. Additionally,

the teacher assigned will be Montessori trained or will obtain Montessori training. The School Director may provide other professional development as needed.

SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, January 20, 2022 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00 p.m.)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA** (6:05 p.m.)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, December 16, 2021.

**B.2 Audit Acceptance** Our auditor has prepared the fiscal audit for 2020-2021 for the Board's acceptance.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6:20)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**

**E.3 Action Items** (6:40)

**E.3.1 Elections** Discussion of elections and formation of committee.
**Action Requested:** Discuss elections**.**

**E.3.2 COVID Safety Procedures** Discussion of changing guidance and its impact on school procedures.
**Action Requested:** Discuss changes.

**E.3.3 SARC** The Board will consider approval of the 2020-2021 SARC: School Accountability Report Card.
**Action Requested:** Approve SARC.

**G. FUTURE AGENDA ITEMS** (7:15)

The Board will receive a presentation on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents.

**H. ADJOURNMENT** (7:20)

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

SHERWOOD MONTESSORI

**REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, December 16, 2021 – 6:00 p.m.**

## Minutes

### A. CALL TO ORDER

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*Meeting was called to order by Russell Shapiro at 6:02 PM, all members present.*

### B. CONSENT AGENDA

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, November 18, 2021.

*Consent agenda items were reviewed, Beth Hammer motioned for approval, Dan LaBar seconded motion with unanimous Board approval.*

### C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS**

**E.1 Items Removed from Consent (If any)**

*None*

**E.2 Reports and Communications**

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 School Director Report**
**E.2.2 Treasurer Report**
**E.2.3 SMPO Report**

*Michelle Yezbick presented School Director Report, Pat Casey presented Treasurer Report, and Marta Tayler emailed SMPO Report for review. Discussion followed. Russell Shapiro added a Board item regarding January election committee assignments. Election Committee assignments will commence at the January Board meeting to prepare for March elections.*

**E.3 Action Items**

**E.3.1 Educator Effectiveness Block Grant** The Board will adopt the draft of the Educator Effectiveness Block Grant.
**Action Requested:** Adopt Educator Effectiveness Block Grant**.**

*Michelle Yezbick presented Educator Effectiveness Block Grant, discussion followed. Dan LaBar motioned for adoption, Beth Hammer seconded motion with unanimous Board approval.*

**E.3.2 First Interim Budget** The Board will adopt the draft of the First Interim Budget.
**Action Requested:** Adopt First Interim Budget.

*Pat Casey presented First interim Budget. Discussion followed. Karey Cooper motioned for adoption, Robyn Howley seconded with unanimous Board approval.*

**E.3.3 Revision of Transitional Kindergarten Policy** The Board will consider a revision of the current Transitional Kindergarten Policy
**Action Requested:** Approve revision.

*Michelle Yezbick presented revised Traditional Kindergarten Policy, discussion followed. Karey Cooper motioned for approval, Robyn Howley seconded with unanimous Board approval.*

**F. Closed Session CONFERENCE WITH LEGAL COUNSEL – Potential Litigation (Gov't. Code section 54956.9(d)(4).)**

*Item removed from agenda as it was not needed.*

**G. FUTURE AGENDA ITEMS**

The Board will be asked to receive the School Accountability Report Card (SARC).

**H. ADJOURNMENT**

*Russell Shapiro adjourned Board meeting at 6:5PM*

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SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Instructional Staff Report**

**Date:** January 20, 2022

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***Instructional Staff was asked to respond to the questions:*** *How did parent/teacher conferences go?*

**Transitional Kindergarten/Kindergarten -Teresa Shippen**

Teresa will attend the meeting and give her report verbally.

**1st/2nd -Kim Powers**

Dear Board,

Happy winter! Thank you for taking the time to read our reports. I hope that they have been enlightening and useful. The first thing that came to mind for this report is to let you know how proud I am of my students. My first and second graders have been growing socially and academically. They have been practicing lots of different ways of interacting and playing with each other. Many of my students practice being the leader as well as being the follower. I have been so proud of them lately for the way they have collectively very warmly and generously welcomed two new students into our class.

My students have been working hard and making lots of academic progress. Our Star Renaissance tests showed marked improvement in language arts and math for most students. My goal this year is to get everyone up to grade level in these two main areas. Despite my best efforts, I can see that some of my students need special academic interventions, and these are being put into the works. I can see from the Star Renaissance tests that I also need to focus more heavily on math concepts. I am confident that my class will be prepared for advancement to their next grade levels by the end of the year, armed with skills and abilities that will allow them to be successful as second and third graders.

**1st/2nd/3rd -Marlo Knox**

I have prepared a very short report to highlight aspects of my classroom I believe will be of interest to the board. First, considering class enrollment, my class size has changed for reasons outside the control of Sherwood. The families of two of my students determined their approximately half hour commute to and from Sherwood was no longer sustainable. One student could enroll in his local school in Orland, the second family came to me from a home school experience and returned to a home school experience. The third student to leave my class has family members involved in a legal dispute. The family was advised by their lawyer to enroll their child at a different school as long as they are in litigation.

Secondly, the importance of volunteerism, helping all families reach their goal of 50 hours of service to Sherwood. My class is filled with talented, supportive adults who want to help. I would say that one of the gifts I've been given is the ability to connect with the families of the students I serve so our children have their needs met and the best opportunities possible for their overall development. To activate adult support takes time and excellent communication. I am just now feeling as if I can, dare I say must, invest more time in this important aspect of Sherwood. Our classroom will have a weekly parent volunteer providing math instruction, as he is a math educator and practiced Montessorian. We have had a parent take over at least half of the care of our class pet. Through her partnership and willingness to help she has led a turtle tank renovation project raising over 500 dollars through a GoFundMe campaign.

Finally, there is a practicing artist who has donated countless supplies to our school and is now ready to assist our classroom with a mural that will create the window that we all wish we had in our room. She and I have made plans to create a beautiful, finished, prepared space for our students inside and outside of our classroom. Through investing time in making our environment beautiful we will teach our children to care, to think about their space and place, and create beauty wherever they can.

My visions, ideas, dreams, needs, and areas where I could use support have not been shared with my entire classroom community because of the time this important work takes. What I am noticing is that functional and productive classroom routines are in place that could afford me time to invest in other areas, such as communicating more with the families I serve. Alas, there is always more to share but I will end here. Thank you for your service to Sherwood. Thank you for the opportunity to share with you a few aspects of my work.

**1st/2nd /3rd -Anne Adams**

I'd just like to relay one new trend in our classroom: Children are drawing themselves working with materials! Attached, you'll find drawings of students counting a bead chain, and of the whole group at circle time (which we call "oval" because our rug is an oval) looking at the globe. To start 2022, I refined our daily schedule to offer a specific hour for language work, an hour for math, and an hour that's split between drawing, songs, and drama. During drawing time, several students have begun to create pictures of themselves and friends working together on bead chains, card material, and other classroom work. One child even drew a picture of his hand writing cursive. that Children who used to draw only video characters have now begun to depict themselves as the action figures, their friends as the sidekicks, and their work as the action. I'm

reading this as positive progress. So, in a challenging moment with lots of covid-related absences, I'm happy to report that those who are still here in the classroom are more present than ever.

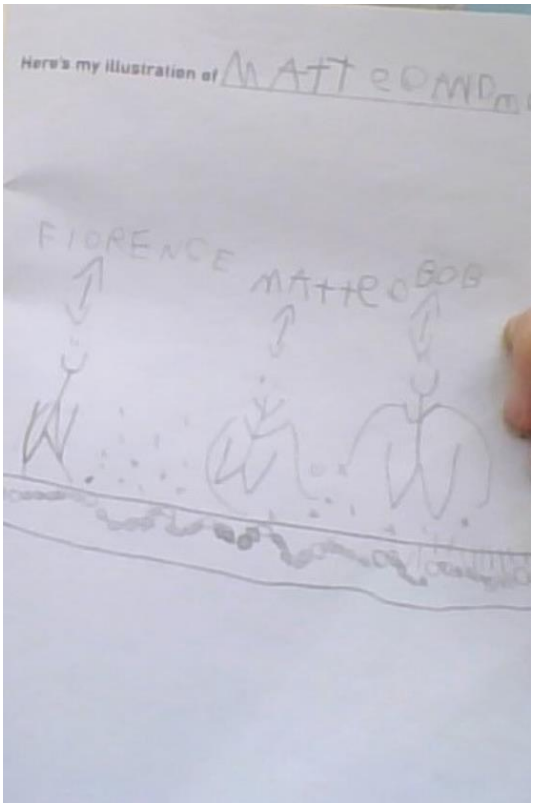
Of course we've also been doing plenty of music, which I always do...even so, I'm impressed by how hands-on this group has gotten. Two months ago, they were passive audience members, but very quickly, they became active choristers reading from songbooks. Now, some students have become strum-stick accompanists who read and interpret notation, practice during the work period, and volunteer to accompany the class when we all sing together.

I know these trends within our classroom's micro-culture will wax and wane and be gradually overtaken by other obsessions—but I'm so curious which lessons will be next to land!

I'll keep you posted,

Anne






**4th /5th/6th -Jessi Lusardi**

Things are going well in room 4. I feel confident that students are moving forward both with academics and social/emotional skills. I have been working on getting some positive behavioral interventions for students who really need them, and I am seeing good results. We had one 6th grader leave last week, as his family moved to Texas, and we have another 5th grader leaving at the end of January, because his family is moving to the Bay area. I now have 15 students in my class, 6 of whom have IEPs, 1 is getting tested for an IEP, and another is starting the paperwork

for a possible IEP. Even though the amount of students in my class with IEPs is high, I believe that all of the students' IEPs are definitely needed, either due to behavioral or academic needs. In my experience so far at Sherwood it seems that parents are drawn to the school because it is small, and they feel their students will be able to get the special attention or help they need.

With the recent surge in COVID cases in the last two weeks comes unexpected closures and absences, as well as overall uncertainty, and I can tell that my students are feeling that (as am I). I have been taking the time in class to have both morning meetings where students can give check-ins, and positive closing meetings at the end of the day. I have also been giving students both structured and unstructured time during the day to play and work together as a large group, so we can keep our sense of community, which I hope will keep them anchored through the uncertainty.

**4th /5th /6th-April Pearce**

Tuesday, we had our second field trip of the school year. We went to Riverbend Park, in Oroville, to release 28 healthy Chinook salmon. We got the eggs with eyes before the Fall Break and watched them hatch and grow, eventually learning to swim. Once they buttoned up (absorbed the yolk sacs they're born with), it was time to say goodbye and wish them well. The trip was a great success and I could not have done it without a supportive group of parent chaperones. In the last year or so they have added sand to the shoreline, making it comparable to the soft white sandy beaches of Mexico. So, in addition to each student getting to release a fish, they waded in the water and played in the sand. It was a delightful day.

**7th/8th-Michael Whittemore**

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** January 20, 2022

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**Administrative**

- Updated enrollment will be reported at the meeting.
- We are currently hiring an additional support person for the Learning Center and an aide for a lower elementary classroom to fill a vacancy that came up over the Winter Break.
- We enrolled new students for the transitional kindergarten program with the vision that they would start on the first day after break and have a first day of school experience. COVID has caused a disruption to the plan as several students had to miss the first day back.

**Safety**

- We are seeing a high number of student and staff absences from the COVID surge.
- There are N95 masks available for staff in the office.
- Take home COVID tests sent home before the break helped families know if they needed to keep kids home even when little or no symptoms were appearing.
- More take home tests and N95s are being made available to us by our County Office of Education.

**Legislative/Legal/Compliance**

- Pat Casey, our Business Manager, and I worked to report funds spent during the last quarter from the state and federal money made available for coronavirus relief.
- I attended a meeting of the SSDA: Small School District Association and found that the superintendents of these rural districts are having some of the same challenges as Sherwood in terms of keeping up with compliance and reporting and working with the restrictions on these funds.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Treasurer's Report**

**Date:** January 20, 2021 Board Meeting

---

Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of December 2021 reconciled with and matched those of the school's internal reports. The New Balance totaled $ 866,412.06 as of December 31, 2021 for the checking account and $50,000 in the special account which will be moved back to the checking account once the contract work at 1010 Cleveland is signed off by the county.
- There were no unexpected high-cost expenses in December.

Profit & Loss

- The December 2021 Profit & Loss report shows a Net Income of -$135,131 which is offset by December LCF funds of $61,595 and EPA funds of $87,713 deposited in January along with grant funds of $99,186.

Cash Flow

- Assuming all Federally allocated funds are received and P2 is at least 100 ADA, the school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Balance Sheet - Current Month
### As of December 31, 2021

| | Dec 31, 21 |
|---|---|
| **ASSETS** | |
| **Current Assets** | |
| **Checking/Savings** | |
| **9100-Assets** | 839,899 |
| **Total Checking/Savings** | 839,899 |
| **Accounts Receivable** | |
| **9200-Accounts Receivable** | 5,338 |
| **Total Accounts Receivable** | 5,338 |
| **Other Current Assets** | |
| **9290 - Due from Grantor Govts.** | -45,215 |
| **9340-Security Deposit** | 50,000 |
| **Total Other Current Assets** | 4,785 |
| **Total Current Assets** | 850,022 |
| **Fixed Assets** | |
| **9410 - Land** | 95,000 |
| **9430- Building** | 182,515 |
| **9435-Accumulated Depreciation** | -21,786 |
| **Total Fixed Assets** | 255,729 |
| **TOTAL ASSETS** | **1,105,751** |
| **LIABILITIES & EQUITY** | |
| **Liabilities** | |
| **Current Liabilities** | |
| **Accounts Payable** | |
| **9500-Accounts Payable** | 19,250 |
| **Total Accounts Payable** | 19,250 |
| **Credit Cards** | |
| **SHERWOOD COSTCO VISA** | 2,074 |

| | Dec 31, 21 |
|---|---|
| Total Credit Cards | 2,074 |
| Other Current Liabilities | |
| 9500-Liabilities | 179,622 |
| Total Other Current Liabilities | 179,622 |
| Total Current Liabilities | 200,946 |
| Total Liabilities | 200,946 |
| Equity | |
| Restricted Assets | 364,551 |
| Unassigned/Unaapproriated | 845,867 |
| Net Income | -305,613 |
| Total Equity | 904,805 |
| **TOTAL LIABILITIES & EQUITY** | **1,105,751** |

# Sherwood Montessori
## Profit & Loss YTD Comparison
September through December 2021

| | Sep - Dec 21 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 538,913 |
| **Total Income** | 538,913 |
| **Gross Profit** | 538,913 |
| **Expense** | |
| **1000 Certificated Salaries** | 230,295 |
| **2000 Classified Salaries** | 181,941 |
| **3000-Employee Benefits** | 119,778 |
| **4000-Books and Supplies** | 30,373 |
| **5000 Services/Other Op. Exp.** | 111,658 |
| **Total Expense** | 674,044 |
| **Net Ordinary Income** | -135,131 |
| **Net Income** | **-135,131** |

# Sherwood Montessori
## Board of Directors - Vendor Payments Report
### December 2021

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 12/01/2021 | 9301 | TIAA Commercial Finan... | DECEMBER BILL | Copier Lease | 243.63 |
| Check | 12/01/2021 | 9313 | EL RAY THEATRE | Winter Festival venue rental | Fundraising Expenses | 2,000.00 |
| Check | 12/01/2021 | 9315 | IT Management Corp | 2 SFP | Computers and Elect... | 1,393.78 |
| Check | 12/01/2021 | DBT | Costco | Snacks | Food (Instructional) | 299.68 |
| Check | 12/01/2021 | DBT | Costco | Masks | PPE | 63.93 |
| Check | 12/01/2021 | DBT | Costco | Coffee | Office Supplies | 28.22 |
| Check | 12/01/2021 | ACH | CharterSAFE | 21-22 P&L PREMIUM 5 | 5400-Liability Insuran... | 2,642.00 |
| Check | 12/01/2021 | ACH | CharterSAFE | 21-22 WC PREMIUM 5 | 3601-Workers Comp | 751.00 |
| Check | 12/01/2021 | EFT | HSA Bank | NOVEMBER 2021 | HSA - K. POWERS | 100.00 |
| Check | 12/02/2021 | DBT | Learning A-Z | RAZ - Plus renewal - 1 Year | Software Licensing | 137.66 |
| Check | 12/02/2021 | DBT | LA COCINA | The Upper L Team meetings | Food - Meetings | 44.09 |
| Check | 12/02/2021 | DBT | HobbyLobby | Craft Supplies | Instructional Supplies | 19.28 |
| Check | 12/02/2021 | DBT | Indeed | Ad for job position | Advertising | 48.93 |
| Check | 12/02/2021 | DBT | Office Depot | SUPPLIES | Office Supplies | 44.09 |
| Check | 12/03/2021 | 9317 | Office Depot | Office supplies | Office Supplies | 89.35 |
| Check | 12/03/2021 | 9318 | Velazquez Flying Carpe... | Carpet cleaning - INV 610 | Housekeeping Servic... | 750.00 |
| Check | 12/03/2021 | DBT | Amazon.com | Fuse beads kit | Extended Day | 24.66 |
| Credit... | 12/03/2021 | | Mendes Supply Co. | Towels - Bond copy paper - ... | Custodial Supplies | 414.82 |
| Check | 12/06/2021 | DBT | Amazon.com | 2000 face masks | PPE | 160.86 |
| Check | 12/06/2021 | DBT | Amazon.com | RM | Instructional Supplies | 219.08 |
| Check | 12/07/2021 | DBT | TEA BAR CAFE | Meal for staff training - PBIS | Food - Meetings | 68.71 |
| Check | 12/08/2021 | EFT | Comcast 4454 | NOVEMBER-DECEMBER S... | Internet Service Provi... | 226.44 |
| Check | 12/08/2021 | EFT | Waste Management | NOVEMBER SERVICE | Trash/Recycling | 128.68 |
| Check | 12/08/2021 | 9319 | Advanced Document | November service | Copier Lease | 115.14 |
| Check | 12/08/2021 | DBT | Amazon.com | Tardy slip sign-in book | Office Supplies | 105.54 |
| Check | 12/08/2021 | DBT | Costco | Snacks | Food (Instructional) | 271.19 |
| Check | 12/08/2021 | DBT | Costco | Masks | PPE | 16.01 |
| Check | 12/08/2021 | DBT | Amazon.com | RM | Instructional Supplies | 57.80 |
| Check | 12/09/2021 | 9320 | Barbara Mandelbaum | INITIAL MEETING-GRANT S... | Grant Services | 450.00 |
| Check | 12/09/2021 | DBT | Adena Montessori | Hundred board + small squar... | LCAP | 63.90 |
| Check | 12/10/2021 | DBT | SIGNS AND GRAPHICS | GRAPHICS | Advertising | 623.94 |
| Credit... | 12/10/2021 | | Nienhuis Montessori | Bells-Bead material- Sandpa... | Extended Day | 237.08 |
| Check | 12/13/2021 | DBT | Costco | Whole cheese | Food - Meetings | 10.67 |
| Check | 12/13/2021 | DBT | Beatniks | Lunch For Staff | Food - Meetings | 58.53 |
| Check | 12/13/2021 | DBT | Western Psychological ... | SSI-4 KIT | Instructional Supplies | 165.17 |
| Check | 12/15/2021 | ACH | COSTCO VISA CARD | NOVEMBER-DECEMBER 2... | SHERWOOD COST... | 3,630.67 |
| Check | 12/16/2021 | EFT | Comcast Business 9110 | DECEMBER-JANUARY | Internet Service Provi... | 306.66 |
| Check | 12/16/2021 | EFT | Verizon Wireless | NOV-DEC | Telephone, Cellular | 99.99 |
| Check | 12/16/2021 | EFT | California Water Service... | NOV | Water | 38.40 |
| Check | 12/16/2021 | 9321 | Richard Hirshen | Food for class and Farmer's ... | Kitchen and garden | 90.16 |
| Check | 12/16/2021 | 9322 | Richard Hirshen | 11 hours x $35 = $385 | Contracted Service | 385.00 |
| Check | 12/16/2021 | 9323 | Advanced Document | November service | Copier Lease | 674.38 |
| Check | 12/16/2021 | DBT | Costco | Snacks | Food (Instructional) | 394.02 |
| Check | 12/16/2021 | DBT | Royal Aire Inc. | HVAC Service | HVAC Service | 98.00 |
| Check | 12/16/2021 | DBT | Crumbl Cookies | Cookies | Food (Instructional) | 38.50 |
| Check | 12/16/2021 | DBT | HP LEASE 7603 | Lease Payment - Customer I... | HP DIRECT LEASE | 316.21 |
| Bill | 12/18/2021 | INV 20... | Pat Casey | CONTRACT SERVICE - DE... | Business Manager S... | 4,000.00 |
| Check | 12/18/2021 | DBT | Wufoo | NOVEMBER SERVICE | Online List Managem... | 19.00 |
| Check | 12/18/2021 | DBT | Amazon.com | Flash cards-Metal Binder Rin... | Instructional Supplies | 30.55 |
| Check | 12/20/2021 | EFT | PG & E | NOVEMBER SERVICE | Electricity | 374.12 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 12/20/2021 | EFT | Heather Fisher | Mileage | 5200-Travel and Con... | 20.27 |
| Check | 12/20/2021 | 9324 | Richard Hirshen | Food for class | Food (Instructional) | 92.22 |
| Check | 12/20/2021 | 7259 | RubiMaria Beck | Livescan | LiveScan and TB Tes... | 64.00 |
| Check | 12/20/2021 | DBT | USPS | Mailing | Postage | 60.76 |
| Check | 12/22/2021 | 9326 | Richard Hirshen | 12/2 - 5 and 12/16 - 5 x $35 ... | Contracted Service | 350.00 |
| Check | 12/22/2021 | 9327 | Macquarie Equipment C... | Kyocera Copier Lease | Copier Lease | 305.66 |
| Check | 12/22/2021 | 9328 | Captain Killion | Lawn services NOV-DEC | Other | 202.20 |
| Check | 12/23/2021 | ACH | Amazon.com | Amazon Prime membership ... | 5300-Dues and Mem... | 13.93 |
| Check | 12/29/2021 | 9330 | CUSD | JULY 2021 FUA - INV 22-00... | CUSD FUA Charges | 1,345.61 |
| Check | 12/29/2021 | 9331 | CUSD | SEPTEMBER 2021 FUA - IN... | CUSD FUA Charges | 2,374.89 |
| Check | 12/30/2021 | 9310 | TIAA Commercial Finan... | DECEMBER BILL - ACTUAL... | Copier Lease | 243.63 |
| Bill | 12/31/2021 | 30375 | Hernandez Cleaning Se... | DECEMBER SERVICE | Housekeeping Servic... | 3,250.00 |
| **TOTAL** | | | | | | **30,892.69** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Elections Process**

**Date:** January 20, 2022

---

**SUMMARY**

The Board will discuss the process for the elections of members of the Board of Directors for Sherwood Montessori.

**DISCUSSION**

At the September 2021 meeting, directors Dan LaBar and Robyn Howley were approved as members of the Elections Committee. At the same meeting, it was determined that at the January meeting there would be a discussion of the elections process at the Board's meeting.

| **Elections Committee** (Required, Ad Hoc) | |
|---|---|
| **Members:** | Two Board members, SMPO member |
| **Meeting Frequency:** | Meets typically two to three times annually, around Board elections time in the spring. |
| **Purpose:** | ● Recruit candidates, announce upcoming election, accept applications for potential candidates, present candidates to SMPO, facilitate election and voting process.<br>● Committee is active in spring as elections approach. First actions would be encouraging recruitment efforts, especially of outgoing members, beginning in March and intensifying in April. The Elections Committee should be prepared to present candidates and their materials at the May meeting of the SMPO. The bylaws do not require approval of the candidates by the whole of the Board. |

| | |
|---|---|
| **Goals:** | Conduct a fair and successful election for a governing board, following bylaws outlined in the current Charter (relevant excerpts below): Sherwood Charter 2017-2022 |
| **Charter/ Bylaws:** | ● Charter, Section 4.0 Governance Structure of School *(speaks to Elections Committee process)*<br>● BYLAWS, SECTION 2. SELECTION: The Board of Directors will be selected in the following way:<br>1. An Elections Committee, appointed by the Board of Directors, will accept applications for potential candidates. The Elections Committee shall be made up of two current members of the Board of Directors with terms that extend beyond the current year and one member of the Sherwood Montessori Parent Organization (SMPO);<br>2. The Elections Committee shall review applications and present a slate of candidates for consideration to the SMPO at the annual meeting in May. Voting will be carried out by the SMPO in consultation with the Elections Committee. Interim appointment shall be done in accordance with Article 4 Section 10 of these by-laws;<br>3. The top vote getter in the event of one seat being open or vote getters in the event of more than one seat being open shall win;<br>4. In the event of a tie, the deciding votes will be made by the Elections Committee.<br>5. New Directors will be announced before the end of the school year and will assume duties at the June meeting. |

**ACTION REQUESTED**

Discuss election process.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **COVID Safety Guidelines Updates**

**Date:** January 20, 2022

---

## SUMMARY

Public health officials at all levels have been updating guidance based on data collected from the newest variant and surge of COVID-19. Sherwood is following the California Department of Public Health (CPDH) guidelines for K-12 schools and adjusting procedures accordingly.

## DISCUSSION

The changes in recommendations have been causing confusion among staff and families. A button linking directly to updated guidance has been uploaded to the school website so parents and employees can read the information directly from the source.

Unfortunately, the guideance includes many "or" scenarios which lead the reader on a journey through hyperlinks. Our school nurse is doing her best to keep up with changes and answer questions, but the many options provided are making the guidance less straightforward than we would hope. In addition to the complexity found on the CDPH website, the guidance found on the Center for Disease Control (CDC) website differs from CDPH, and there are multiple scenarios for whether a person is looking for guidance for a school, a health care professional, an employee, or just a citizen who does not fit into any of these categories.

Guidance recently has changed several times within a week. Rather than providing a summary here which is likely to change by the time of our meeting I will provide the Board the link that is on the website and brief directors on the latest iteration at our meeting.

## ACTION REQUESTED

Discuss changes.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Accountability Report Card**

**Date:** January 20, 2022

---

Each year, the School Director is required to complete a School Accountability Report Card (SARC) in accordance with state law. Attached is the SARC completed for the 2020-2021 school year.

**DISCUSSION**

The SARC includes data on enrollment demographics, facilities, learning materials, school spending, teacher credentials and professional development. The information is provided in a CDE approved template. All information in the report is public information.

**ACTION REQUESTED**

Approve report.

Attachment: 2020-2021 SARC

# Sherwood Montessori
## 2021 School Accountability Report Card

## General Information about the School Accountability Report Card (SARC)

### SARC Overview



By February 1 of each year, every school in California is required by state law to publish a School Accountability Report Card (SARC). The SARC contains information about the condition and performance of each California public school. Under the Local Control Funding Formula (LCFF) all local educational agencies (LEAs) are required to prepare a Local Control and Accountability Plan (LCAP), which describes how they intend to meet annual school-specific goals for all pupils, with specific activities to address state and local priorities. Additionally, data reported in an LCAP is to be consistent with data reported in the SARC.

For more information about SARC requirements and access to prior year reports, see the California Department of Education (CDE) SARC web page at www.cde.ca.gov/ta/ac/sa/

For more information about the LCFF or the LCAP, see the CDE LCFF web page at www.cde.ca.gov/fg/aa/lc/

For additional information about the school, parents/guardians and community members should contact the school principal or the district office.

### DataQuest

DataQuest is an online data tool located on the CDE DataQuest web page at dq.cde.ca.gov/dataquest/ that contains additional information about this school and comparisons of the school to the district and the county. Specifically, DataQuest is a dynamic system that provides reports for accountability (e.g., test data, enrollment, high school graduates, dropouts, course enrollments, staffing, and data regarding English learners).

### California School Dashboard

The California School Dashboard (Dashboard) www.caschooldashboard.org/ reflects California's new accountability and continuous improvement system and provides information about how LEAs and schools are meeting the needs of California's diverse student population. The Dashboard contains reports that display the performance of LEAs, schools, and student groups on a set of state and local measures to assist in identifying strengths, challenges, and areas in need of improvement.

### Internet Access

Internet access is available at public libraries and other locations that are publicly accessible (e.g., the California State Library). Access to the Internet at libraries and public locations is generally provided on a first-come, first-served basis. Other use restrictions may include the hours of operation, the length of time that a workstation may be used (depending on availability), the types of software programs available on a workstation, and the ability to print documents.

## 2021-22 School Contact Information

| | |
|---|---|
| **School Name** | Sherwood Montessori |
| **Street** | 1010 Cleveland Ave. |
| **City, State, Zip** | Chico |
| **Phone Number** | 530-345-6600 |
| **Principal** | Michelle Yezbick, Director |
| **Email Address** | michelle@sherwoodmontessori.org |
| **School Website** | www.sherwoodmontessori.org |
| **County-District-School (CDS) Code** | 04614240121475 |

## 2021-22 District Contact Information

| | |
|---|---|
| **District Name** | Sherwood Montessori |
| **Phone Number** | 530-345-6600 |
| **Superintendent** | Michelle Yezbick |
| **Email Address** | michelle@sherwoodmontessori.org |
| **District Website Address** | www.sherwoodmontessori.org |

## 2021-22 School Overview

The mission of Sherwood Montessori is to educate K-8 students of the greater Chico area by providing Montessori education within the context of mutual respect and joy. The focus of the education will be on engaging critical thinking and fostering empathy, and developing the skills needed to become competent, responsible citizens w ho are life-long learners and skillful problem solvers.

The school will serve our community by providing a rich and supportive educational environment for children based upon the philosophy of Maria Montessori which allow s each child to reach his or her own potential academically, personally, and socially and will focus on educating the whole child intellectually, physically, and psychologically. The methodology used will develop a firm foundation for the students, and will emphasize ethics, initiative, persistence, and self-confidence.

This mission will be accomplished by a concerted community-based effort between the school, the parents, and the individual child.

## About this School

### 2020-21 Student Enrollment by Grade Level

| Grade Level | Number of Students |
|---|---|
| Kindergarten | 15 |
| Grade 1 | 27 |
| Grade 2 | 15 |
| Grade 3 | 16 |
| Grade 4 | 11 |
| Grade 5 | 19 |
| Grade 6 | 4 |
| Grade 7 | 7 |
| Grade 8 | 8 |
| Total Enrollment | 122 |

### 2020-21 Student Enrollment by Student Group

| Student Group | Percent of Total Enrollment |
|---|---|
| American Indian or Alaska Native | 1.6 |
| Asian | 3.3 |
| Black or African American | 4.1 |
| Hispanic or Latino | 18 |
| Two or More Races | 18.9 |
| White | 54.1 |
| English Learners | 5.7 |
| Foster Youth | 1.6 |
| Homeless | 5.7 |
| Socioeconomically Disadvantaged | 63.1 |
| Students with Disabilities | 17.2 |

## A. Conditions of Learning

### State Priority: Basic

The SARC provides the following information relevant to the State priority: Basic (Priority 1):

- Degree to which teachers are appropriately assigned and fully credentialed in the subject area and for the pupils they are teaching;
- Pupils have access to standards-aligned instructional materials; and
- School facilities are maintained in good repair

Note: For more information refer to the Updated Teacher Equity Definitions web page at https://www.cde.ca.gov/pd/ee/teacherequitydefinitions.asp

## 2019-20 Teacher Preparation and Placement

| Authorization/Assignment | 2019-20 |
|---|---|
| **Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)** | |
| **Intern Credential Holders Properly Assigned** | |
| **Teachers Without Credentials and Misassignments ("ineffective" under ESSA)** | |
| **Credentialed Teachers Assigned Out-of-Field ("out-of-field" under ESSA)** | |
| **Unknown** | |
| **Total Teaching Positions** | |

Note: The data in this table is based on Full Time Equivalent (FTE) status. One FTE equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. Additionally, an assignment is defined as a position that an educator is assigned to based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

## 2019-20 Teachers Without Credentials and Misassignments (considered "ineffective" under ESSA)

| Authorization/Assignment | 2019-20 |
|---|---|
| **Permits and Waivers** | |
| **Misassignments** | |
| **Vacant Positions** | |
| **Total Teachers Without Credentials and Misassignments** | |

## 2019-20 Credentialed Teachers Assigned Out-of-Field (considered "out-of-field" under ESSA)

| Indicator | 2019-20 |
|---|---|
| **Credentialed Teachers Authorized on a Permit or Waiver** | |
| **Local Assignment Options** | |
| **Total Out-of-Field Teachers** | |

## 2019-20 Class Assignments

| Indicator | 2019-20 |
|---|---|
| **Misassignments for English Learners**<br>(a percentage of all the classes with English learners taught by teachers that are misassigned) | |
| **No credential, permit or authorization to teach**<br>(a percentage of all the classes taught by teachers with no record of an authorization to teach) | |

## 2021-22 Quality, Currency, Availability of Textbooks and Other Instructional Materials

| | |
|---|---|
| **Year and month in which the data were collected** | January 2021 |

| Subject | Textbooks and Other Instructional Materials/year of Adoption | From Most Recent Adoption ? | Percent Students Lacking Own Assigned Copy |
|---|---|---|---|
| **Reading/Language Arts** | Traditional Montessori materials<br>Reading A to Z/2021 | Yes | 0.0 |
| **Mathematics** | Traditional Montessori materials<br>California College Preparatory Mathematics (CPM) grades 6-8/2021 | Yes | 0.0 |
| **Science** | Traditional Montessori Materials<br>The California Education and the Environment Initiative (EEI) Curriculum grades 4-6<br>Waseca Biomes Curriculum grades 1-3<br>TCI grades 7-8/2021 | Yes | 0.0 |
| **History-Social Science** | Traditional Montessori Materials<br>TCI grades 7-8/2021 | Yes | 0.0 |
| **Foreign Language** | Spanish materials, dictionaries & Duolingo application | Yes | 0.0 |
| **Health** | Traditional Montessori Materials<br>TCI Science 2021 | Yes | 0.0 |
| **Visual and Performing Arts** | Montessori Arts Curriculum | Yes | 0.0 |
| **Science Laboratory Equipment** (grades 9-12) | | | |

## School Facility Conditions and Planned Improvements

The main campus of Sherwood Montessori is located on the north side of Chapman Elementary campus, with an auxiliary campus located at 1010 Cleveland Ave. The main campus includes eight classrooms and an office; 20th Street Park connects the two campuses. Through funds available from the Measure K bond, Sherwood has been able to complete a construction project to install two classrooms at the 1010 site. One classroom is used primarily for a science and art lab and the other is a school library. A future project will involve a third, larger classroom that will include a separate space for a teaching kitchen. Once this project is finished, the school can move forward on setting up additional gardening beds for its cooking and gardening program.

| | |
|---|---|
| **Year and month of the most recent FIT report** | 1/2021 |

| System Inspected | Rate Good | Rate Fair | Rate Poor | Repair Needed and Action Taken or Planned |
|---|---|---|---|---|
| **Systems:**<br>Gas Leaks, Mechanical/HVAC, Sewer | X | | | |
| **Interior:**<br>Interior Surfaces | X | | | |
| **Cleanliness:**<br>Overall Cleanliness, Pest/Vermin Infestation | X | | | |
| **Electrical** | X | | | |

## School Facility Conditions and Planned Improvements

| | | | | |
|---|---|---|---|---|
| **Restrooms/Fountains:** Restrooms, Sinks/ Fountains | | X | | Leaks in the roof of the girls' restroom have been patched repeatedly and material is unsightly. The ceiling will need to be patched again and repainted. |
| **Safety:** Fire Safety, Hazardous Materials | X | | | |
| **Structural:** Structural Damage, Roofs | X | | | |
| **External:** Playground/School Grounds, Windows/ Doors/Gates/Fences | X | | | |

## Overall Facility Rate

| Exemplary | Good | Fair | Poor |
|---|---|---|---|
| | X | | |

## B. Pupil Outcomes

# State Priority: Pupil Achievement

The SARC provides the following information relevant to the State priority: Pupil Achievement (Priority 4):

**Statewide Assessments**
(i.e., California Assessment of Student Performance and Progress [CAASPP] System includes the Smarter Balanced Summative Assessments for students in the general education population and the California Alternate Assessments [CAAs] for English language arts/literacy [ELA] and mathematics given in grades three through eight and grade eleven. Only eligible students may participate in the administration of the CAAs. CAAs items are aligned with alternate achievement standards, which are linked with the Common Core State Standards [CCSS] for students with the most significant cognitive disabilities).

The CAASPP System encompasses the following assessments and student participation requirements:

1. **Smarter Balanced Summative Assessments and CAAs for ELA** in grades three through eight and grade eleven.
2. **Smarter Balanced Summative Assessments and CAAs for mathematics** in grades three through eight and grade eleven.
3. **California Science Test (CAST) and CAAs for Science** in grades five, eight, and once in high school (i.e., grade ten, eleven, or twelve).

**SARC Reporting in the 2020-2021 School Year Only**
Where the most viable option, LEAs were required to administer the statewide summative assessment in ELA and mathematics. Where a statewide summative assessment was not the most viable option for the LEA (or for one or more grade-level[s] within the LEA) due to the pandemic, LEAs were allowed to report results from a different assessment that met the criteria established by the State Board of Education (SBE) on March 16, 2021. The assessments were required to be:

- Aligned with CA CCSS for ELA and mathematics;
- Available to students in grades 3 through 8, and grade 11; and
- Uniformly administered across a grade, grade span, school, or district to all eligible students.

**Options**
Note that the CAAs could only be administered in-person following health and safety requirements. If it was not viable for the LEA to administer the CAAs in person with health and safety guidelines in place, the LEA was directed to not administer the tests. There were no other assessment options available for the CAAs. Schools administered the Smarter Balanced Summative Assessments for ELA and mathematics, other assessments that meet the SBE criteria, or a combination of both, and they could only choose one of the following:

- Smarter Balanced ELA and mathematics summative assessments;
- Other assessments meeting the SBE criteria; or
- Combination of Smarter Balanced ELA and mathematics summative assessments and other assessments.

The percentage of students who have successfully completed courses that satisfy the requirements for entrance to the University of California and the California State University, or career technical education sequences or programs of study.

## Percentage of Students Meeting or Exceeding the State Standard on CAASPP

This table displays CAASPP test results in ELA and mathematics for all students grades three through eight and grade eleven taking and completing a state-administered assessment.

The 2019-2020 data cells with N/A values indicate that the 2019-2020 data are not available due to the COVID-19 pandemic and resulting summative test suspension. The Executive Order N-30-20 was issued which waived the assessment, accountability, and reporting requirements for the 2019-2020 school year.

The 2020-2021 data cells have N/A values because these data are not comparable to other year data due to the COVID-19 pandemic during the 2020-2021 school year. Where the CAASPP assessments in ELA and/or mathematics is not the most viable option, the LEAs were allowed to administer local assessments. Therefore, the 2020-2021 data between school years for the school, district, state are not an accurate comparison. As such, it is inappropriate to compare results of the 2020-2021 school year to other school years.

| Subject | School 2019-20 | School 2020-21 | District 2019-20 | District 2020-21 | State 2019-20 | State 2020-21 |
|---|---|---|---|---|---|---|
| **English Language Arts/Literacy** (grades 3-8 and 11) | N/A | N/A | N/A | N/A | N/A | N/A |
| **Mathematics** (grades 3-8 and 11) | N/A | N/A | N/A | N/A | N/A | N/A |

## 2020-21 CAASPP Test Results in ELA by Student Group

This table displays CAASPP test results in ELA by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment. The CDE will populate this table for schools in cases where the school administered the CAASPP assessment. In cases where the school administered a local assessment instead of CAASPP, the CDE will populate this table with "NT" values, meaning this school did not test students using the CAASPP. See the local assessment(s) table for more information.

| CAASPP Student Groups | CAASPP Total Enrollment | CAASPP Number Tested | CAASPP Percent Tested | CAASPP Percent Not Tested | CAASPP Percent Met or Exceeded |
|---|---|---|---|---|---|
| **All Students** | 70 | 59 | 84.29 | 15.71 | 35.59 |
| **Female** | 35 | 28 | 80 | 20 | 32.14 |
| **Male** | 35 | 31 | 88.57 | 11.43 | 38.71 |
| **American Indian or Alaska Native** | -- | -- | -- | -- | -- |
| **Asian** | -- | -- | -- | -- | -- |
| **Black or African American** | -- | -- | -- | -- | -- |
| **Filipino** | 0 | 0 | 0 | 0 | 0 |
| **Hispanic or Latino** | 12 | 12 | 100 | 0 | 33.33 |
| **Native Hawaiian or Pacific Islander** | 0 | 0 | 0 | 0 | 0 |
| **Two or More Races** | 14 | 12 | 85.71 | 14.29 | 50 |
| **White** | 37 | 28 | 75.68 | 24.32 | 32.14 |
| **English Learners** | -- | -- | -- | -- | -- |
| **Foster Youth** | -- | -- | -- | -- | -- |
| **Homeless** | -- | -- | -- | -- | -- |
| **Military** | 0 | 0 | 0 | 0 | 0 |
| **Socioeconomically Disadvantaged** | 41 | 34 | 82.93 | 17.07 | 35.29 |
| **Students Receiving Migrant Education Services** | 0 | 0 | 0 | 0 | 0 |
| **Students with Disabilities** | 16 | 14 | 87.5 | 12.5 | 21.43 |

## 2020-21 CAASPP Test Results in Math by Student Group

This table displays CAASPP test results in Math by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment. The CDE will populate this table for schools in cases where the school administered the CAASPP assessment. In cases where the school administered a local assessment instead of CAASPP, the CDE will populate this table with "NT" values, meaning this school did not test students using the CAASPP. See the local assessment(s) table for more information.

| CAASPP Student Groups | CAASPP Total Enrollment | CAASPP Number Tested | CAASPP Percent Tested | CAASPP Percent Not Tested | CAASPP Percent Met or Exceeded |
|---|---|---|---|---|---|
| **All Students** | 70 | 59 | 84.29 | 15.71 | 16.95 |
| **Female** | 35 | 28 | 80.00 | 20.00 | 17.86 |
| **Male** | 35 | 31 | 88.57 | 11.43 | 16.13 |
| **American Indian or Alaska Native** | -- | -- | -- | -- | -- |
| **Asian** | -- | -- | -- | -- | -- |
| **Black or African American** | -- | -- | -- | -- | -- |
| **Filipino** | 0 | 0 | 0 | 0 | 0 |
| **Hispanic or Latino** | 12 | 12 | 100.00 | 0.00 | 25.00 |
| **Native Hawaiian or Pacific Islander** | 0 | 0 | 0 | 0 | 0 |
| **Two or More Races** | 14 | 12 | 85.71 | 14.29 | 16.67 |
| **White** | 37 | 28 | 75.68 | 24.32 | 17.86 |
| **English Learners** | -- | -- | -- | -- | -- |
| **Foster Youth** | -- | -- | -- | -- | -- |
| **Homeless** | -- | -- | -- | -- | -- |
| **Military** | 0 | 0 | 0 | 0 | 0 |
| **Socioeconomically Disadvantaged** | 41 | 33 | 80.49 | 19.51 | 24.24 |
| **Students Receiving Migrant Education Services** | 0 | 0 | 0 | 0 | 0 |
| **Students with Disabilities** | 16 | 14 | 87.50 | 12.50 | 7.14 |

## 2020-21 Local Assessment Test Results in ELA by Student Group

This table displays Local Assessment test results in ELA by student group for students grades three through eight and grade eleven. LEAs/schools will populate this table for schools in cases where the school administered a local assessment. In cases where the school administered the CAASPP assessment, LEAs/schools will populate this table with "N/A" values in all cells, meaning this table is Not Applicable for this school.

| N/A Student Groups | N/A Total Enrollment | N/A Number Tested | N/A Percent Tested | N/A Percent Not Tested | N/A Percent At or Above Grade Level |
|---|---|---|---|---|---|
| **All Students** | N/A | N/A | N/A | N/A | N/A |
| **Female** | N/A | N/A | N/A | N/A | N/A |
| **Male** | N/A | N/A | N/A | N/A | N/A |
| **American Indian or Alaska Native** | N/A | N/A | N/A | N/A | N/A |
| **Asian** | N/A | N/A | N/A | N/A | N/A |

| | | | | | |
|---|---|---|---|---|---|
| **Black or African American** | N/A | N/A | N/A | N/A | N/A |
| **Filipino** | N/A | N/A | N/A | N/A | N/A |
| **Hispanic or Latino** | N/A | N/A | N/A | N/A | N/A |
| **Native Hawaiian or Pacific Islander** | N/A | N/A | N/A | N/A | N/A |
| **Two or More Races** | N/A | N/A | N/A | N/A | N/A |
| **White** | N/A | N/A | N/A | N/A | N/A |
| **English Learners** | N/A | N/A | N/A | N/A | N/A |
| **Foster Youth** | N/A | N/A | N/A | N/A | N/A |
| **Homeless** | N/A | N/A | N/A | N/A | N/A |
| **Military** | N/A | N/A | N/A | N/A | N/A |
| **Socioeconomically Disadvantaged** | N/A | N/A | N/A | N/A | N/A |
| **Students Receiving Migrant Education Services** | N/A | N/A | N/A | N/A | N/A |
| **Students with Disabilities** | N/A | N/A | N/A | N/A | N/A |

*At or above the grade-level standard in the context of the local assessment administered.

## 2020-21 Local Assessment Test Results in Math by Student Group

This table displays Local Assessment test results in Math by student group for students grades three through eight and grade eleven. LEAs/schools will populate this table for schools in cases where the school administered a local assessment. In cases where the school administered the CAASPP assessment, LEAs/schools will populate this table with "N/A" values in all cells, meaning this table is Not Applicable for this school.

| N/A Student Groups | N/A Total Enrollment | N/A Number Tested | N/A Percent Tested | N/A Percent Not Tested | N/A Percent At or Above Grade Level |
|---|---|---|---|---|---|
| **All Students** | N/A | N/A | N/A | N/A | N/A |
| **Female** | N/A | N/A | N/A | N/A | N/A |
| **Male** | N/A | N/A | N/A | N/A | N/A |
| **American Indian or Alaska Native** | N/A | N/A | N/A | N/A | N/A |
| **Asian** | N/A | N/A | N/A | N/A | N/A |
| **Black or African American** | N/A | N/A | N/A | N/A | N/A |
| **Filipino** | N/A | N/A | N/A | N/A | N/A |
| **Hispanic or Latino** | N/A | N/A | N/A | N/A | N/A |
| **Native Hawaiian or Pacific Islander** | N/A | N/A | N/A | N/A | N/A |
| **Two or More Races** | N/A | N/A | N/A | N/A | N/A |
| **White** | N/A | N/A | N/A | N/A | N/A |
| **English Learners** | N/A | N/A | N/A | N/A | N/A |
| **Foster Youth** | N/A | N/A | N/A | N/A | N/A |
| **Homeless** | N/A | N/A | N/A | N/A | N/A |
| **Military** | N/A | N/A | N/A | N/A | N/A |
| **Socioeconomically Disadvantaged** | N/A | N/A | N/A | N/A | N/A |
| **Students Receiving Migrant Education Services** | N/A | N/A | N/A | N/A | N/A |

| | | | | | |
|---|---|---|---|---|---|
| **Students with Disabilities** | N/A | N/A | N/A | N/A | N/A |

*At or above the grade-level standard in the context of the local assessment administered.

## CAASPP Test Results in Science for All Students

This table displays the percentage of all students grades five, eight, and High School meeting or exceeding the State Standard.

The 2019-2020 data cells with N/A values indicate that the 2019-2020 data are not available due to the COVID-19 pandemic and resulting summative testing suspension. The Executive Order N-30-20 was issued which waived the assessment, accountability, and reporting requirements for the 2019-2020 school year.

For any 2020-2021 data cells with N/T values indicate that this school did not test students using the CAASPP Science.

| Subject | School 2019-20 | School 2020-21 | District 2019-20 | District 2020-21 | State 2019-20 | State 2020-21 |
|---|---|---|---|---|---|---|
| **Science** (grades 5, 8 and high school) | N/A | 28.00 | N/A | 0.00 | N/A | 28.72 |

## 2020-21 CAASPP Test Results in Science by Student Group

This table displays CAASPP test results in Science by student group for students grades five, eight, and High School. For any data cells with N/T values indicate that this school did not test students using the CAASPP Science.

| Student Group | Total Enrollment | Number Tested | Percent Tested | Percent Not Tested | Percent Met or Exceeded |
|---|---|---|---|---|---|
| **All Students** | 28 | 25 | 89.29 | 10.71 | 28.00 |
| **Female** | 17 | 14 | 82.35 | | |
| **Male** | 11 | 11 | 100.00 | | |
| **American Indian or Alaska Native** | -- | -- | -- | -- | -- |
| **Asian** | -- | -- | -- | -- | -- |
| **Black or African American** | 0 | 0 | 0 | 0 | 0 |
| **Filipino** | 0 | 0 | 0 | 0 | 0 |
| **Hispanic or Latino** | -- | -- | -- | -- | -- |
| **Native Hawaiian or Pacific Islander** | 0 | 0 | 0 | 0 | 0 |
| **Two or More Races** | -- | -- | -- | -- | -- |
| **White** | 17 | 15 | 88.24 | 11.76 | 33.33 |
| **English Learners** | -- | -- | -- | -- | -- |
| **Foster Youth** | 0 | 0 | 0 | 0 | 0 |
| **Homeless** | -- | -- | -- | -- | -- |
| **Military** | 0 | 0 | 0 | 0 | 0 |
| **Socioeconomically Disadvantaged** | 14 | 11 | 78.57 | 21.43 | 27.27 |
| **Students Receiving Migrant Education Services** | 0 | 0 | 0 | 0 | 0 |
| **Students with Disabilities** | -- | -- | -- | -- | -- |

## B. Pupil Outcomes

## State Priority: Other Pupil Outcomes

The SARC provides the following information relevant to the State priority: Other Pupil Outcomes (Priority 8): Pupil outcomes in the subject area of physical education.

### 2020-21 California Physical Fitness Test Results

Due to the COVID-19 crisis, the Physical Fitness Test was suspended during the 2020-2021 school year and therefore no data are reported and each cell in this table is populated with "N/A."

| Grade Level | Percentage of Students Meeting Four of Six Fitness Standards | Percentage of Students Meeting Five of Six Fitness Standards | Percentage of Students Meeting Six of Six Fitness Standards |
|---|---|---|---|
| **Grade 5** | N/A | N/A | N/A |
| **Grade 7** | N/A | N/A | N/A |
| **Grade 9** | N/A | N/A | N/A |

## C. Engagement

## State Priority: Parental Involvement

The SARC provides the following information relevant to the State priority: Parental Involvement (Priority 3): Efforts the school district makes to seek parent input in making decisions regarding the school district and at each school site.

### 2021-22 Opportunities for Parental Involvement

Parent involvement is vital for the success of Sherwood Montessori. In addition to providing volunteer opportunities that enrich our program, with participation parents make a powerful statement to the children that school is important and education is valued by the family. The SMPO provides parents with an avenue to effective participation in the school's operations. All parents at Sherwood are defacto members of the SMPO. Active membership is encouraged and achieved by attending regularly scheduled SMPO meetings. At meetings, parents can learn more about how to optimize their skills as a volunteer.

The SMPO is self-governed by an elected panel of three parents, serving staggered two-year terms, chosen for the following year through an open vote of all parents prior to the annual June Meeting of the Board of Directors. A representative of the SMPO will be responsible for communication between the SMPO and the Board.

## 2020-21 Chronic Absenteeism by Student Group

| Student Group | Cumulative Enrollment | Chronic Absenteeism Eligible Enrollment | Chronic Absenteeism Count | Chronic Absenteeism Rate |
|---|---|---|---|---|
| **All Students** | 138 | 136 | 6 | 4.4 |
| **Female** | 58 | 57 | 5 | 8.8 |
| **Male** | 80 | 79 | 1 | 1.3 |
| **American Indian or Alaska Native** | 2 | 2 | 0 | 0.0 |
| **Asian** | 4 | 4 | 0 | 0.0 |
| **Black or African American** | 5 | 5 | 0 | 0.0 |
| **Filipino** | 0 | 0 | 0 | 0.0 |
| **Hispanic or Latino** | 25 | 24 | 0 | 0.0 |
| **Native Hawaiian or Pacific Islander** | 0 | 0 | 0 | 0.0 |
| **Two or More Races** | 27 | 27 | 2 | 7.4 |
| **White** | 75 | 74 | 4 | 5.4 |
| **English Learners** | 10 | 10 | 0 | 0.0 |
| **Foster Youth** | 2 | 2 | 0 | 0.0 |
| **Homeless** | 7 | 7 | 1 | 14.3 |
| **Socioeconomically Disadvantaged** | 86 | 85 | 4 | 4.7 |
| **Students Receiving Migrant Education Services** | 0 | 0 | 0 | 0.0 |
| **Students with Disabilities** | 24 | 23 | 2 | 8.7 |

## C. Engagement

### State Priority: School Climate

The SARC provides the following information relevant to the State priority: School Climate (Priority 6):

- Pupil suspension rates;
- Pupil expulsion rates; and
- Other local measures on the sense of safety

## Suspensions and Expulsions

This table displays suspensions and expulsions data collected between July through June, each full school year respectively. Data collected during the 2020-21 school year may not be comparable to earlier years of this collection due to differences in learning mode instruction in response to the COVID-19 pandemic.

| Subject | School 2018-19 | School 2020-21 | District 2018-19 | District 2020-21 | State 2018-19 | State 2020-21 |
|---|---|---|---|---|---|---|
| **Suspensions** | 2.76 | 1.45 | 4.22 | 0.67 | 3.47 | 0.20 |
| **Expulsions** | 0.55 | 0.72 | 0.07 | 0.01 | 0.08 | 0.00 |

This table displays suspensions and expulsions data collected between July through February, partial school year due to the COVID-19 pandemic. The 2019-2020 suspensions and expulsions rate data are not comparable to other year data because the 2019-2020 school year is a partial school year due to the COVID-19 crisis. As such, it would be inappropriate to make any comparisons in rates of suspensions and expulsions in the 2019-2020 school year compared to other school years.

| Subject | School 2019-20 | District 2019-20 | State 2019-20 |
|---|---|---|---|
| **Suspensions** | 4.05 | 3.42 | 2.45 |
| **Expulsions** | 0.00 | 0.25 | 0.05 |

## 2020-21 Suspensions and Expulsions by Student Group

| Student Group | Suspensions Rate | Expulsions Rate |
|---|---|---|
| **All Students** | 1.45 | 0.72 |
| **Female** | 0.00 | 0.00 |
| **Male** | 2.50 | 1.25 |
| **American Indian or Alaska Native** | 0.00 | 0.00 |
| **Asian** | 0.00 | 0.00 |
| **Black or African American** | 0.00 | 0.00 |
| **Filipino** | 0.00 | 0.00 |
| **Hispanic or Latino** | 4.00 | 4.00 |
| **Native Hawaiian or Pacific Islander** | 0.00 | 0.00 |
| **Two or More Races** | 0.00 | 0.00 |
| **White** | 0.00 | 0.00 |
| **English Learners** | 0.00 | 0.00 |
| **Foster Youth** | 0.00 | 0.00 |
| **Homeless** | 0.00 | 0.00 |
| **Socioeconomically Disadvantaged** | | |
| **Students Receiving Migrant Education Services** | 0.00 | 0.00 |
| **Students with Disabilities** | | |

## 2021-22 School Safety Plan

The School Safety Plan has been written by the Director with input from the Safety Committee and the school's insurance provider. The Safety Plan is updated annually in the summer for the next school year. Sherwood's Safety Plan provides for the physical and psychological safety of all students, staff and families of the Sherwood community. The most recent revision was February, 2021. Input was sought from Safety Committee members and faculty and staff in February and adopted by the Board in an open, public meeting on February 18, 2021. Key elements included: Child Abuse Reporting Procedures, School Discipline Guidelines, Sexual Harassment Policies, Procedure for Safe Ingress and Egress, School Discipline Rules and Consequences, Hate Crime Reporting Procedures and Policies, Procedures to Prepare for Active Shooters, and Procedures for Preventing Acts of Bullying and Cyber-bullying.

In addition to the School Safety Plan, a Reopening School Safely Plan was written with guidance from the Center for Disease Control, California Department of Education, California Department of Public Health, and the Butte County Department of Public Health. This plan includes more specific details for safely responding to the COVID-19 pandemic and continues to be revised as health guidance is updated.

# D. Other SARC Information

## Information Required in the SARC

The information in this section is required to be in the SARC but is not included in the state priorities for LCFF.

## 2018-19 Elementary Average Class Size and Class Size Distribution

This table displays the 2018-19 average class size and class size distribution. The columns titled "Number of Classes" indicates how many classes fall into each size category (a range of total students per class). The "Other" category is for multi-grade level classes.

| Grade Level | Average Class Size | Number of Classes with 1-20 Students | Number of Classes with 21-32 Students | Number of Classes with 33+ Students |
|---|---|---|---|---|
| **K** | 12 | 2 | | |
| **1** | 6 | 3 | | |
| **2** | 5 | 3 | | |
| **3** | 8 | 3 | | |
| **4** | 8 | 2 | | |
| **5** | 11 | 2 | | |
| **6** | 6 | 2 | | |

## 2019-20 Elementary Average Class Size and Class Size Distribution

This table displays the 2019-20 average class size and class size distribution. The columns titled "Number of Classes" indicates how many classes fall into each size category (a range of total students per class). The "Other" category is for multi-grade level classes.

| Grade Level | Average Class Size | Number of Classes with 1-20 Students | Number of Classes with 21-32 Students | Number of Classes with 33+ Students |
|---|---|---|---|---|
| **K** | 8 | 4 | | |
| **1** | 8 | 2 | | |
| **2** | 9 | 2 | | |
| **3** | 7 | 2 | | |
| **4** | 12 | 2 | | |
| **5** | 6 | 2 | | |
| **6** | 7 | 2 | | |

## 2020-21 Elementary Average Class Size and Class Size Distribution

This table displays the 2020-21 average class size and class size distribution. The columns titled "Number of Classes" indicates how many classes fall into each size category (a range of total students per class). The "Other" category is for multi-grade level classes.

| Grade Level | Average Class Size | Number of Classes with 1-20 Students | Number of Classes with 21-32 Students | Number of Classes with 33+ Students |
|---|---|---|---|---|
| **K** | 8 | 2 | | |
| **1** | 9 | 3 | | |
| **2** | 8 | 2 | | |
| **3** | 8 | 2 | | |
| **4** | 6 | 2 | | |
| **5** | 10 | 2 | | |
| **6** | 2 | 2 | | |

## 2020-21 Ratio of Pupils to Academic Counselor

This table displays the ratio of pupils to Academic Counselor. One full time equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time.

| Title | Ratio |
|---|---|
| **Pupils to Academic Counselor** | |

## 2020-21 Student Support Services Staff

This table displays the number of FTE support staff assigned to this school. One full time equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time.

| Title | Number of FTE Assigned to School |
|---|---|
| **Counselor (Academic, Social/Behavioral or Career Development)** | 0 |
| **Library Media Teacher (Librarian)** | 0 |
| **Library Media Services Staff (Paraprofessional)** | 0 |
| **Psychologist** | 0 |
| **Social Worker** | 0 |
| **Nurse** | 0.1 |
| **Speech/Language/Hearing Specialist** | 0 |
| **Resource Specialist (non-teaching)** | 0 |

## 2019-20 Expenditures Per Pupil and School Site Teacher Salaries

This table displays the 2019-20 expenditures per pupil and average teach salary for this school. Cells with N/A values do not require data.

| Level | Total Expenditures Per Pupil | Expenditures Per Pupil (Restricted) | Expenditures Per Pupil (Unrestricted) | Average Teacher Salary |
|---|---|---|---|---|
| **School Site** | $9,196.89 | $1,818.64 | $7,378.25 | $42,089 |
| **District** | N/A | N/A | $7,753.31 | $75,734 |
| **Percent Difference - School Site and District** | N/A | N/A | -5.0 | -54.2 |
| **State** | | | $8,444 | $86,376 |
| **Percent Difference - School Site and State** | N/A | N/A | -4.9 | -67.1 |

## 2020-21 Types of Services Funded

The Montessori approach to education is holistic, considering not only the intellectual development of the child but the physical and emotional development as well. Sherwood supports a number of services that reflect this value, including: counseling with a MSW counselor, Positive Behavior Interventions and Supports (PBIS), social emotional learning curriculum such as Second Step, SEL Toolbox, and Montessori Grace and Courtesy curriculum, outdoor education and gardening program that fosters healthy lifestyle choices and enrichment instruction in the arts. Academics are supplemented with intervention and enrichment services in reading, writing, and math including Montessori Pathways reading remediation program for phonics instruction, guided reading using leveled texts, and free tutoring after school in the Extended Day program.

## 2019-20 Teacher and Administrative Salaries

This table displays the 2019-20 Teacher and Administrative salaries. For detailed information on salaries, see the CDE Certification Salaries & Benefits web page at http://www.cde.ca.gov/ds/fd/cs/.

| Category | District Amount | State Average for Districts in Same Category |
|---|---|---|
| **Beginning Teacher Salary** | $49,195 | $52,562 |
| **Mid-Range Teacher Salary** | $66,564 | $83,575 |
| **Highest Teacher Salary** | $104,767 | $104,166 |
| **Average Principal Salary (Elementary)** | $114,497 | $131,875 |
| **Average Principal Salary (Middle)** | $121,376 | $137,852 |
| **Average Principal Salary (High)** | $126,883 | $150,626 |
| **Superintendent Salary** | $238,553 | $260,243 |
| **Percent of Budget for Teacher Salaries** | 33% | 34% |
| **Percent of Budget for Administrative Salaries** | 4% | 5% |

## Professional Development

Sherwood Montessori is dedicated to providing an authentic Montessori education for our students. To this end, it is essential to have properly trained Montessori teachers. During the 2018-2019 school year, Sherwood joined the International Montessori Council to have access to current training specific to Montessori practitioners and continued its membership in 2019-2020. In 2020-2021 teachers participated in Public Montessori in Action professional development to facilitate distance learning, as well as training to use Guidepost Montessori through the Altitude Learning distance learning platform. In 2020-2021 and 2021-2022 teachers and staff participated in Anti-Racism professional development specifically for Montessori teachers.

In addition to Montessori trainings, Sherwood teachers and Director take part in training offered through the Butte County Office of Education and other local sources for professional development. During the most recent three years, staff attended professional development related to implementing Common Core State Standards, implementing a Multi-Tiered System of Support/Response to Intervention and Instruction model, the Nurtured Heart Approach, working with students with Autism Spectrum Disorder, balanced literacy instruction in a Montessori classroom, implementing Mindfulness in the classroom, suicide prevention and other topics.

In the 2017-2018 school year, Sherwood was awarded the SUMS (Scale Up Multi-Tiered System of Support) grant for MTSS (Multi-Tiered System of Support) and has been attending professional development designed to improve practices in intervention and special education programs. This was also the school's first year of PBIS (Positive Behavior Interventions and Supports) training, a three-year program. Currently the school is in its fourth year of PBIS training and implementation.

In response to the Camp Fire, during the 2018-2019 school year all Sherwood faculty and staff participated in high quality professional development provided by the Butte County Office of Education. Presenters included Dr. Bruce Perry, Dr. David Schofled, Dr. Stephen Brock & Dr. Shelley Hart.

In 2019-2020 Sherwood began using Vector (formerly, SafeSchools) online training available through Charter Safe, the school's insurance provider. This allows teachers and staff to update mandatory training on a flexible schedule. Twice monthly support staff meetings were established, giving classroom and support aides more opportunities to access professional development specific to growing their competence as Montessori aides.

Professional development meetings also take place on site, once to twice monthly, on Wednesdays. Topics chosen for professional development are decided collaboratively by the teaching faculty using student data as a guide.

This table displays the number of school days dedicated to staff development and continuous improvement.

| Subject | 2019-20 | 2020-21 | 2021-22 |
|---|---|---|---|

| Professional Development | | | |
|---|---|---|---|
| **Number of school days dedicated to Staff Development and Continuous Improvement** | 7.5 | 8 | 6 |

# Sherwood Montessori

## 2020-21 Local Accountability Report Card (LARC) Addendum

## Local Accountability Report Card (LARC) Addendum

### 2020-21 Local Accountability Report Card (LARC) Addendum Overview



On July 14, 2021, the California State Board of Education (SBE) determined that the California Department of Education (CDE) will use the SARC as the mechanism to conduct a one-time data collection of the LEA-level aggregate test results of all school's local assessments administered during the 2020–2021 school year in order to meet the federal Every Students Succeeds Act (ESSA) reporting requirement for the Local Educational Agency Accountability Report Cards (LARCs).

Each local educational agency (LEA) is responsible for preparing and posting their annual LARC in accordance with the federal ESSA. As a courtesy, the CDE prepares and posts the LARCs on behalf of all LEAs.

Only for the 2020–2021 school year and the 2020–2021 LARCs, LEAs are required to report their aggregate local assessments test results at the LEA-level to the CDE by populating the tables below via the SARC. These data will be used to meet the LEAs' federal requirement for their LARCs. Note that it is the responsibility of the school and LEA to ensure that all student privacy and suppression rules are in place when reporting data in Tables 3 and 4 in the Addendum, as applicable.

The tables below are not part of the SBE approved 2020–2021 SARC template but rather are the mechanism by which these required data will be collected from LEAs.

For purposes of the LARC and the following tables, an LEA is defined as a school district, a county office of education, or a direct funded charter school.

| 2021-22 District Contact Information | |
|---|---|
| **District Name** | Sherwood Montessori |
| **Phone Number** | 530-345-6600 |
| **Superintendent** | Michelle Yezbick |
| **Email Address** | michelle@sherwoodmontessori.org |
| **District Website Address** | www.sherwoodmontessori.org |

## 2020-21 CAASPP Test Results in ELA by Student Group

This table displays CAASPP test results in ELA by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment. The CDE will populate this table for schools in cases where the school administered the CAASPP assessment. In cases where the school administered a local assessment instead of CAASPP, the CDE will populate this table with "NT" values, meaning this school did not test students using the CAASPP. See the local assessment(s) table for more information.

| CAASPP Student Groups | CAASPP Total Enrollment | CAASPP Number Tested | CAASPP Percent Tested | CAASPP Percent Not Tested | CAASPP Percent Met or Exceeded |
|---|---|---|---|---|---|
| **All Students** | 6263 | 866 | 13.83 | 86.17 | 70.10 |
| **Female** | 2973 | 398 | 13.39 | 86.61 | 76.88 |
| **Male** | 3278 | 467 | 14.25 | 85.75 | 64.44 |
| **American Indian or Alaska Native** | 71 | 10 | -- | 85.92 | -- |
| **Asian** | 315 | 49 | 15.56 | 84.44 | 81.63 |
| **Black or African American** | 121 | 16 | 13.22 | 86.78 | 68.75 |
| **Filipino** | 36 | 6 | 16.67 | 83.33 | -- |
| **Hispanic or Latino** | 1746 | 213 | 12.20 | 87.80 | 54.25 |
| **Native Hawaiian or Pacific Islander** | 34 | 8 | 23.53 | 76.47 | -- |
| **Two or More Races** | 494 | 48 | 9.72 | 90.28 | 60.42 |
| **White** | 3446 | 516 | 14.97 | 85.03 | 77.04 |
| **English Learners** | 371 | 6 | 1.62 | 98.38 | -- |
| **Foster Youth** | 51 | 6 | 11.76 | 88.24 | -- |
| **Homeless** | 420 | 80 | 19.05 | 80.95 | 36.84 |
| **Military** | 276 | 36 | 13.04 | 86.96 | 69.44 |
| **Socioeconomically Disadvantaged** | 3479 | 406 | 11.67 | 88.33 | 60.40 |
| **Students Receiving Migrant Education Services** | -- | -- | -- | -- | -- |
| **Students with Disabilities** | 915 | 131 | 14.32 | 85.68 | 21.54 |

## 2020-21 CAASPP Test Results in Math by Student Group

This table displays CAASPP test results in Math by student group for students grades three through eight and grade eleven taking and completing a state-administered assessment. The CDE will populate this table for schools in cases where the school administered the CAASPP assessment. In cases where the school administered a local assessment instead of CAASPP, the CDE will populate this table with "NT" values, meaning this school did not test students using the CAASPP. See the local assessment(s) table for more information.

| CAASPP Student Groups | CAASPP Total Enrollment | CAASPP Number Tested | CAASPP Percent Tested | CAASPP Percent Not Tested | CAASPP Percent Met or Exceeded |
|---|---|---|---|---|---|
| **All Students** | 6262 | 853 | 13.62 | 86.38 | 40.49 |
| **Female** | 2972 | 394 | 13.26 | 86.74 | 40.71 |
| **Male** | 3278 | 458 | 13.97 | 86.03 | 40.39 |
| **American Indian or Alaska Native** | 71 | 9 | -- | 87.32 | -- |
| **Asian** | 315 | 50 | 15.87 | 84.13 | 52.00 |
| **Black or African American** | 121 | 16 | 13.22 | 86.78 | 31.25 |
| **Filipino** | 36 | 6 | 16.67 | 83.33 | -- |
| **Hispanic or Latino** | 1746 | 208 | 11.91 | 88.09 | 21.26 |
| **Native Hawaiian or Pacific Islander** | 34 | 8 | 23.53 | 76.47 | -- |
| **Two or More Races** | 494 | 45 | 9.11 | 90.89 | 37.78 |
| **White** | 3445 | 511 | 14.83 | | 48.14 |
| **English Learners** | 371 | 7 | 1.89 | 98.11 | -- |
| **Foster Youth** | 50 | 6 | 12.00 | 88.00 | -- |
| **Homeless** | 420 | 72 | 17.14 | 82.86 | 11.11 |
| **Military** | 276 | 37 | 13.41 | 86.59 | 43.24 |
| **Socioeconomically Disadvantaged** | 3478 | 399 | 11.47 | 88.53 | 27.14 |
| **Students Receiving Migrant Education Services** | -- | -- | -- | -- | -- |
| **Students with Disabilities** | 915 | 128 | 13.99 | 86.01 | 10.16 |

## 2020-21 Local Assessment Test Results in ELA by Student Group

This table displays Local Assessment test results in ELA by student group for students grades three through eight and grade eleven. LEAs/schools will populate this table for schools in cases where the school administered a local assessment. In cases where the school administered the CAASPP assessment, LEAs/schools will populate this table with "N/A" values in all cells, meaning this table is Not Applicable for this school.
*At or above the grade-level standard in the context of the local assessment administered.

## 2020-21 Local Assessment Test Results in Math by Student Group

This table displays Local Assessment test results in Math by student group for students grades three through eight and grade eleven. LEAs/schools will populate this table for schools in cases where the school administered a local assessment. In cases where the school administered the CAASPP assessment, LEAs/schools will populate this table with "N/A" values in all cells, meaning this table is Not Applicable for this school.
*At or above the grade-level standard in the context of the local assessment administered.

# SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, February 17, 2022 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00 p.m.)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA** (6:05 p.m.)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, January 20, 2021.

**B.2 Audit Acceptance** Our auditor has prepared the fiscal audit for 2020-2021 for the Board's acceptance.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6:20)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**
**E.2.5 Chair Report**

**E.3 Action Items** (6:45)

**E.3.1 Supplement Annual Update** The Board will be presented with an update to the LCAP that takes into account additional funding from the 2021 Budget Act.
**Action Requested:** Receive report.

**E.3.2 Comprehensive School Safety Plan** The Board will be asked to approve the updated Safety Plan for 2022-2023.
**Action Requested:** Adopt plan.

**E.3.3 School Plan for Safe Reopening** The Board will be asked to approve the updated School Plan for Safe Reopening now titled School Plan for Safe Operations During COVID-19 Pandemic.
**Action Requested:** Approve plan.

**F. CLOSED SESSION** (7:15)

**F.1 Public Employee Performance Evaluation**

With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director.

**G. FUTURE AGENDA ITEMS** (7:30)

The Board will be asked to discuss the 2022-2023 Local Control Accountability Plan (LCAP) and adopt the LCAP at a subsequent meeting before June 30. The Board will receive an update on Board Elections.

**H. ADJOURNMENT** (7:45)

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

SHERWOOD MONTESSORI

**REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, January 20, 2022 – 6:00 p.m.**

## Minutes

**A. CALL TO ORDER A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*All Board members in attendance, meeting called to order by Russell Shapiro at 6:01PM. It should be noted the meeting recording begins at 6:04 and is acknowledged by Russell Shapiro at that time.*

**B. CONSENT AGENDA**

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, December 16, 2021.

**B.2 Audit Acceptance** Our auditor has prepared the fiscal audit for 2020-2021 for the Board's acceptance.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

*Minutes from Regular Meeting December 16, 2021 were reviewed by Board members. Beth Hammer motioned to approve meeting minutes, Dan LaBar seconded and motion passed with unanimous vote. Audit Acceptance was removed from Consent Agenda as item is not available for review.*

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA**

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS**

**E.1 Items Removed from Consent (If any)**

*Audit acceptance has been removed from Consent Agenda as noted above.*

**E.2 Reports and Communications** (6:20)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**

*Instructional Staff Report was presented by Michelle Yezbick with updated comments from instructional staff. School Directors report was presented by Michelle Yezbick. Pat Casey presented Treasurer Report. SMPO Report not available for meeting. Discussion followed.*

**E.3 Action Items**

**E.3.1 Elections** Discussion of elections and formation of committee. **Action Requested:** Discuss elections**.**

*Russell Shapiro reviewed upcoming Board elections and the election committee that includes Board members Dan LaBar and Robyn Howley. Discussion followed.*

**E.3.2 COVID Safety Procedures** Discussion of changing guidance and its impact on school procedures.

**Action Requested:** Discuss changes.

*Covid Safety Procedures were reviewed and updated by Michelle Yezbick as the situation continues to be fluid. Discussion followed*

**E.3.3 SARC** The Board will consider approval of the 2020-2021 SARC: School Accountability Report Card.
**Action Requested:** Approve SARC.

*SARC was presented by Michelle Yezbick. Discussion followed. Karey Cooper motioned for approval, Robyn Howley seconded with unanimous approval of present Board Members (Dan LaBar was absent for this vote).*

**G. FUTURE AGENDA ITEMS**

The Board will receive a presentation on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents.
School Acronym list review.

**H. ADJOURNMENT**

*Russell Shapiro adjourned meeting at 7:17PM*

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

# Sherwood Montessori

**Chico, California**
**Charter School #1166**

FINANCIAL STATEMENTS AND SUPPLEMENTARY INFORMATION
WITH INDEPENDENT AUDITORS' REPORTS

**June 30, 2021**

HORTON MCNULTY & SAETEURN, LLP

**Sherwood Montessori**
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**INDEPENDENT AUDITORS' REPORT**

To the Board of Directors
Sherwood Montessori
Chico, California

## Report on the Financial Statements

We have audited the accompanying financial statements of Sherwood Montessori (the Charter School), a nonprofit public benefit corporation, which comprise the statement of financial position as of June 30, 2021; the related statements of activities and cash flows for the year then ended; and the related notes to the financial statements.

### *Management's Responsibility for the Financial Statements*

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### *Auditors' Responsibility*

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the Charter School's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Charter School's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

### *Opinion*

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Charter School as of June 30, 2021, and the changes in its net assets and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

### *Other Matter*

Our audit was conducted for the purpose of forming an opinion on the financial statements taken as a whole. The accompanying schedule of instructional time is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from, and relates directly to, the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements, or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

The local educational agency organization structure has not been subjected to the auditing procedures applied in the audit of the financial statements and, accordingly, we do not express an opinion or provide any assurance on it.

### Other Report Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated January 28, 2022, on our consideration of the Charter School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance, and the results of that testing, and not to provide an opinion on the effectiveness of internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Charter School's internal control over financial reporting and compliance.

Horton McNulty & Gaeteurn, LLP

January 28, 2022
Chico, California

# FINANCIAL SECTION

## Sherwood Montessori

STATEMENT OF FINANCIAL POSITION

June 30, 2021

| | | |
|---|---|---|
| **ASSETS** | | |
| **Current Assets** | | |
| Cash and cash equivalents | $ | 644,831 |
| Due from federal government | | 25,855 |
| Due from state government | | 373,149 |
| Due from local governments | | 70,412 |
| **Total Current Assets** | | 1,114,247 |
| **Property and Equipment** | | |
| Net of accumulated depreciation | | 246,603 |
| **TOTAL ASSETS** | $ | 1,360,850 |
| **LIABILITIES AND NET ASSETS** | | |
| **Current Liabilities** | | |
| Accounts payable | $ | 11,564 |
| Accrued payroll and payroll liabilities | | 64,183 |
| Due to federal government | | 1,375 |
| Due to state government | | 120,014 |
| Due to local governments | | 10,120 |
| Refundable advances | | 29,257 |
| **Total Liabilities** | | 236,513 |
| **Net Assets** | | |
| Without donor restrictions | | 947,016 |
| With donor restrictions | | 177,321 |
| **Total Net Assets** | | 1,124,337 |
| **TOTAL LIABILITIES AND NET ASSETS** | $ | 1,360,850 |

*The accompanying notes are an integral part of these financial statements.*

## Sherwood Montessori

STATEMENT OF ACTIVITIES

| Year Ended June 30, 2021 | Without Donor Restrictions | With Donor Restrictions | Total |
|---|---|---|---|
| **Revenue and Other Support** | | | |
| Local control funding formula sources | $ 1,325,723 | $ - | $ 1,325,723 |
| Federal revenue | - | 112,184 | 112,184 |
| State revenue | 80,900 | 158,754 | 239,654 |
| Contributions | 2,748 | - | 2,748 |
| Net assets released from restrictions | 254,346 | (254,346) | - |
| **Total Revenue and Other Support** | 1,663,717 | 16,592 | 1,680,309 |
| **Expenses** | | | |
| Program services: | | | |
| Instruction services | 937,401 | - | 937,401 |
| Instruction-related services | 156,481 | - | 156,481 |
| Pupil services | 62,219 | - | 62,219 |
| Ancillary services | 397 | - | 397 |
| Plant services | 56,444 | - | 56,444 |
| **Total Program Services** | 1,212,942 | - | 1,212,942 |
| Supporting services: | | | |
| General administration | 243,151 | - | 243,151 |
| **Total Expenses** | 1,456,093 | - | 1,456,093 |
| **Change in Net Assets** | 207,624 | 16,592 | 224,216 |
| **Net Assets - Beginning of Year** | 739,392 | 160,729 | 900,121 |
| **Net Assets - End of Year** | $ 947,016 | $ 177,321 | $ 1,124,337 |

*The accompanying notes are an integral part of these financial statements.*

## Sherwood Montessori

STATEMENT OF CASH FLOWS

Year Ended June 30, 2021

| | | |
|---|---|---|
| **CASH FLOWS FROM OPERATING ACTIVITIES** | | |
| Change in net assets | $ | 224,216 |
| Adjustments to reconcile change in net assets to net cash provided by operating activities: | | |
| Depreciation | | 9,126 |
| Changes in: | | |
| Due from federal government | | (4,960) |
| Due from state government | | (207,124) |
| Due from local governments | | (12,657) |
| Accounts payable | | 6,983 |
| Accrued payroll and payroll liabilities | | 13,778 |
| Due to federal government | | 1,375 |
| Due to state government | | 2,533 |
| Due to local governments | | 8,489 |
| Refundable advances | | 15,749 |
| **NET CASH PROVIDED BY OPERATING ACTIVITIES** | | 57,508 |
| **Cash and Cash Equivalents - Beginning of Year** | | 587,323 |
| **Cash and Cash Equivalents - End of Year** | $ | 644,831 |

*The accompanying notes are an integral part of these financial statements.*

## 1. SIGNIFICANT ACCOUNTING POLICIES

The following is a summary of significant accounting policies followed in the preparation of the financial statements.

***Organization*** Sherwood Montessori (the Charter School), is a nonprofit public benefit corporation, which receives its principal funding from the California Department of Education and Chico Unified School District, in lieu of local property taxes, to operate a classroom-based instruction program for students in kindergarten through grade eight, primarily in Chico, California. Chico Unified School District is the sponsoring local educational agency of the Charter School.

***Basis of Accounting and Presentation*** The financial statements have been prepared on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America. Net assets, revenues, and expenses are classified based on the existence or absence of stipulations imposed by donors or grantors. Accordingly, net assets of the Charter School, and changes therein, are classified and reported as follows:

*Net Assets Without Donor Restrictions:* Net assets that are not subject to stipulations imposed by donors or grantors and may be expended for any purpose in performing the primary objectives of the Charter School. These net assets may be used at the discretion of the Charter School's management and the board of directors.

*Net Assets With Donor Restrictions*: Net assets subject to stipulations imposed by donors and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of the Charter School or by the passage of time. Other donor restrictions are perpetual in nature, whereby the donor has stipulated the funds be maintained in perpetuity.

Donor restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expires, net assets are reclassified from net assets with donor restrictions to net assets without donor restrictions in the statements of activities. Donor contributions with a measurable performance barrier and a right of return are not recognized in the statement of activities until conditions on which they depend have been met.

***Cash and Cash Equivalents*** The Charter School considers all highly liquid investments with an initial maturity of three months or less to be cash and cash equivalents.

***Due From Federal, State, and Local Governments*** Amounts due from federal, state, and local governments include entitlements and grants from federal, state, and local governments that the Charter School has earned or been allocated, but has not received as of June 30, 2021. Management believes that all receivables are fully collectible.

***Property and Equipment*** Property and equipment purchased for $5,000 or greater are recorded at cost and depreciated over their estimated useful lives using the straight-line method. Depreciation is computed on a straight-line basis over the estimated useful lives of buildings (50 years) and building improvements (20 - 25 years). At the time property and equipment are retired or otherwise disposed of, the cost and the related accumulated depreciation are adjusted, and any gain or loss on disposal is included in the statement of activities.

***Refundable Advances*** Cash received for federal and state special projects and programs is recognized as revenue to the extent that qualified expenses have been incurred. Refundable advances from grantors are recorded to the extent that cash received on specific programs exceeds qualified expenses.

***Income Taxes*** The Charter School is a nonprofit corporation operating under Section 501(c)(3) of the *Internal Revenue Code* (IRC) and 23701(d) of the *California Revenue and Taxation Code*, and is exempt from federal and state income taxes. Accordingly, no provision for income taxes is included in these financial statements. In addition, the Charter School is classified as an organization that is not a private foundation under Section 509(a)(2) of the IRC. Management believes that it has appropriate support for any tax positions taken; accordingly, management believes there are no uncertain tax positions that are material to the financial statements.

***Functional Expenses Allocation*** The financial statements report certain categories of expenses that are attributable to more than one program or supporting function. Therefore, these expenses require allocation on a reasonable basis that is consistently applied. The expenses that are allocated include depreciation, interest, and office and occupancy, which are allocated on a square-footage basis, as well as salaries and benefits, which are allocated on the basis of estimates of time and effort.

***Advertising*** The cost of advertising is charged to expenses as incurred. Advertising costs for the year ended June 30, 2021, were $2,565.

***Estimates*** The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

***Evaluation of Subsequent Events*** Management has evaluated subsequent events through January 28, 2022, the date the financial statements were available to be issued.

## 2. AVAILABILITY AND LIQUIDITY

The following represents the Charter School's financial assets available to meet general expenditures, liabilities, and other obligations over the next twelve months:

| June 30, 2021 | | |
|---|---|---|
| Cash and cash equivalents | $ | 644,831 |
| Due from federal government | | 25,855 |
| Due from state government | | 373,149 |
| Due from local governments | | 70,412 |
| **Total Financial Assets** | $ | 1,114,247 |

Of this amount, $177,321 is subject to donor imposed purpose restrictions, as detailed in note 5, and $29,257 represents refundable advances with purpose restrictions, therefore, these financial assets are not available to meet cash needs for general expenditures. The Charter School's goal is generally to maintain financial assets to meet anticipated operating expenses projected on a monthly basis based on management's knowledge of upcoming fixed and variable costs. As part of its liquidity plan, excess cash is stored in the Northern California National Bank.

## 3. PROPERTY AND EQUIPMENT

Property and equipment consisted of the following:

| June 30, 2021 | | |
|---|---|---|
| Land | $ | 95,000 |
| Buildings and improvements | | 182,515 |
| **Subtotal** | | 277,515 |
| Less: Accumulated depreciation | | 30,912 |
| **Property and Equipment - Net** | $ | 246,603 |

Depreciation expense amounted to $9,126 for the year ended June 30, 2021.

## 4. JOINT POWERS AUTHORITY

The Charter School participates in a joint venture under a joint powers agreement with the California Charter Schools Joint Powers Authority (CharterSAFE).

CharterSAFE (the JPA) arranges for and provides property, liability, workers' compensation, and excess liability coverage for their members. The JPA is governed by a board consisting of representatives from the members. The board controls the operations of the JPA, including selection of management and approval of operating budgets, independent of any influence by the members beyond their representation on the board. Each member pays a premium commensurate with the level of coverage requested and shares surpluses and deficits proportionate to its participation in the JPA. The Charter School's share of year-end assets, liabilities, or fund equity is not calculated by the JPA. Separately issued financial statements may be requested from the JPA.

## 5. NET ASSETS WITH DONOR RESTRICTIONS

Net assets with donor restrictions are restricted for the following purposes:

| June 30, 2021 | | |
|---|---|---|
| Subject to expenditure for specified purpose: | | |
| Program services: | | |
| Clean energy projects | $ | 151,603 |
| Expanded learning opportunities grants | | 25,718 |
| **Total Net Assets With Donor Restrictions** | $ | 177,321 |

## 6. FUNCTIONAL EXPENSE ANALYSIS

The table below presents expenses by both their nature and their function for the fiscal year ended June 30, 2021.

| | Program Activities | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Year Ended June 30, 2021 | Instruction Services | Instruction-Related Services | Pupil Services | Ancillary Services | Plant Services | Program Subtotal | General Administration | Total Expenses |
| Certificated salaries | $ 463,904 | $ - | $ - | $ - | $ - | $ 463,904 | $ - | $ 463,904 |
| Classified salaries | 143,592 | 76,401 | 39,301 | - | - | 259,294 | 32,743 | 292,037 |
| Employee benefits | 207,217 | 44,553 | 22,918 | - | - | 274,688 | 19,094 | 293,782 |
| Books and supplies | 28,196 | - | - | 397 | 2,186 | 30,779 | 53,836 | 84,615 |
| Services and other operating | 85,366 | 35,527 | - | - | 54,258 | 175,151 | 137,478 | 312,629 |
| Depreciation | 9,126 | - | - | - | - | 9,126 | - | 9,126 |
| **Total Expenses** | $ 937,401 | $ 156,481 | $ 62,219 | $ 397 | $ 56,444 | $ 1,212,942 | $ 243,151 | $ 1,456,093 |

## 7. OPERATING LEASES

The Charter School has entered into various operating leases for equipment with lease terms in excess of one year. The agreements do not contain a purchase option. Future minimum lease payments are as follows:

| Year Ending June 30 | | |
|---|---|---|
| 2022 | $ | 1,734 |

The Charter School will not pay any contingent rentals nor receive any sublease rental revenues for this equipment. Lease expense amounted to $13,120 for the fiscal year ended June 30, 2021.

## 8. COMMITMENTS AND CONTINGENCIES

### Federal and State Allowances, Awards, and Grants

The Charter School has received federal and state funds for specific purposes that are subject to review and audit by the grantor agencies. Although such audits could generate expense disallowances under terms of the grants, it is believed that any required reimbursements will not be material.

### COVID-19

The novel coronavirus, COVID-19, was declared a worldwide pandemic by the World Health Organization on March 11, 2020. The ongoing pandemic has caused an economic downturn on a global scale, disrupted global supply chains, and created significant uncertainty, volatility, and disruption across economies and financial markets. The COVID-19 pandemic remains a rapidly-evolving situation. The impact of the pandemic on the Charter School's operations and financial performance will depend on future developments, including government mandates and duration of the pandemic, all of which are uncertain and difficult to predict. As a result, it is not currently possible to assess the overall impact of COVID-19 on the Charter School's future. However, if the pandemic continues, the disease could have a material adverse effect on the Charter School's results of operations, financial condition, and cash flows. Management is monitoring the situation on a daily basis in order to mitigate the potential impact of COVID-19 on the Charter School's operations and financial performance.

## 9. RISK MANAGEMENT

The Charter School is exposed to various risks, including loss or damage to property, general liability, and injuries to employees. Settled claims resulting from these risks have not exceeded insurance coverage in any of the past three years. No significant reductions in insurance coverage from the prior year have been made. As described above, the Charter School participates in risk pools under a joint powers agreement for property, liability, workers' compensation, and excess liability coverage.

## 10. EMPLOYEE RETIREMENT SYSTEMS

Qualified employees are covered under cost-sharing multiple-employer defined benefit pension plans maintained by agencies of the state of California. Certificated employees are members of the California State Teachers' Retirement System (CalSTRS) and classified employees are members of the California Public Employees' Retirement System (CalPERS).

The risks of participating in these multi-employer plans are different from single-employer plans in the following aspects:

- Assets contributed to the multi-employer plan by one employer may be used to provide benefits to employees of other participating employers.
- If a participating employer stops contributing to the plan, the unfunded obligations of the plan may be borne by the remaining participating employers.
- If the Charter School chooses to stop participating in some of its multi-employer plans, it may be required to pay those plans an amount based on the underfunded status of the plan, referred to as a withdrawal liability.

### California State Teachers' Retirement System

***Plan Description*** The Charter School contributes to State Teachers' Retirement Plan (STRP), a cost-sharing multiple-employer public employee retirement system defined benefit pension plan administered by CalSTRS. STRP provides retirement, disability, and survivor benefits to beneficiaries. Benefit provisions are established by state statute, as legislatively amended, within the Teachers' Retirement Law. CalSTRS issues a publicly available *Comprehensive Annual Financial Report* (CAFR) that includes financial statements and required supplementary information. Copies of the CAFR may be obtained from CalSTRS, 100 Waterfront Place, Sacramento, California, 95605, and from www.calstrs.com.

According to the most recently available CAFR for the fiscal year ended June 30, 2020, the total pension liability for STRP was $343,893,000,000, fiduciary net position was $246,984,000,000, employer and state contributions totaled $9,789,262,830, and the plan is 72% funded. The Charter School did not contribute more than 5% of the total contributions to the plan.

***Funding Policy*** Active plan members of the CalSTRS 2% at 60 benefit formula are required to contribute 10.25% of their salary. Active plan members of the CalSTRS 2% at 62 benefit formula are required to contribute 10.205% of their salary. The required employer contribution rate for fiscal year 2020-21 was 16.15% of annual payroll. The contribution requirements of the plan members are established by state statute. The Charter School's contributions to CalSTRS for the fiscal years ended June 30, 2021, 2020, and 2019, were $73,306, $80,907, and $68,349, respectively, and equaled 100% of the required contributions for the year. State Teachers' Retirement Law also requires the state to contribute 10.328% of the members' creditable earnings from the fiscal year ending in the prior calendar year. *California Education Code*, Section 22950.6 appropriated an additional $2,246,000,000 from the state's General Fund for the 2018–19 fiscal year to be transferred to the Teachers' Retirement Fund to reduce school employer's contributions and unfunded liabilities for the 2019-20 and 2020-21 fiscal years. For the year ended June 30, 2021, the Charter School recognized pension expense of $50,176 and revenue of $50,176 for support provided by the state.

## California Public Employees' Retirement System

***Plan Description*** The Charter School contributes to the School Employer Pool under CalPERS, a cost-sharing multiple-employer public employee retirement system defined benefit pension plan administered by CalPERS. The plan provides retirement, disability benefits, and death benefits to plan members and beneficiaries. Benefit provisions are established by state statute, as legislatively amended, within the Public Employees' Retirement Law. CalPERS issues a publicly available CAFR that includes financial statements and required supplementary information. Copies of the CAFR may be obtained from CalPERS, 400 Q Street, Sacramento, California, 95811, and from www.calpers.ca.gov.

According to the most recently available CAFR for the fiscal year ended June 30, 2020, the School Employer Pool total pension liability was $102,289,672,000, fiduciary net position was $71,606,596,000, employer and state contributions totaled $3,744,726,979, and the plan is 70% funded. The Charter School did not contribute more than 5% of the total contributions to the plan.

***Funding Policy*** Active plan members that meet the definition of a new member under the Public Employees' Pension Reform Act are required to contribute 7.00% of their salary. Classic employees are required to contribute 7.00% of their salary. The Charter School is required to contribute an actuarially determined rate. The actuarial methods and assumptions used for determining the rate are those adopted by the CalPERS Board of Administration. The required employer contribution rate for the 2020-21 fiscal year was 20.70%. The contribution requirements of the plan members are established by state statute. The Charter School's contributions to CalPERS for the fiscal years ended June 30, 2021, 2020, and 2019, were $30,388, $27,402, and $25,801, respectively, and equaled 100% of the required contributions for each year.

## 11. RECENT ACCOUNTING PRONOUNCEMENTS

In February 2016, FASB issued ASU 2016-02, *Leases* (Topic 842). This ASU intends to increase transparency and comparability among organizations by recognizing lease assets and lease liabilities on the statement of financial position and disclosing key information about leasing arrangements. Previous to this ASU, entities were allowed to exclude from the statement of financial position leases classified as operating leases. This ASU requires lessees to recognize the assets and liabilities arising from leases on the statement of net position. The Charter School's management has not yet determined the impact that implementation of this update will have on the Charter School's financial statements. The ASU is effective for the period ending June 30, 2023, and will be applied retrospectively.

# OTHER SUPPLEMENTARY INFORMATION SECTION

The Sherwood Montessori (the Charter School), charter number 1166, is located in Butte County and was established on May 6, 2010. The Charter School was numbered by the State Board of Education on May 6, 2010, and is sponsored by Chico Unified School District. The Charter School currently operates one elementary school.

## GOVERNING BOARD

| Name | Office | Term Expires |
|---|---|---|
| Dr. Russel Shapiro | Chair | 2023 |
| Brandy Thomas | Vice Chair | 2023 |
| Mharia Ross-Walcott | Treasurer | 2023 |
| Dr. Beth Hammer | Secretary | 2023 |
| Rosie Paulson | Member | 2022 |

## ADMINISTRATION

Michelle Yezbick
Director

Patrick Casey
Business Manager

## Sherwood Montessori

SCHEDULE OF INSTRUCTIONAL TIME

Year Ended June 30, 2021

| | Required Instructional Days | Actual Instructional Days Offered | Approved J-13A Credited Days* | Traditional Calendar Days | Multitrack Calendar Days | Status |
|---|---|---|---|---|---|---|
| Kindergarten | 175 | 180 | - | 180 | N/A | Complied |
| Grade 1 | 175 | 180 | - | 180 | N/A | Complied |
| Grade 2 | 175 | 180 | - | 180 | N/A | Complied |
| Grade 3 | 175 | 180 | - | 180 | N/A | Complied |
| Grade 4 | 175 | 180 | - | 180 | N/A | Complied |
| Grade 5 | 175 | 180 | - | 180 | N/A | Complied |
| Grade 6 | 175 | 180 | - | 180 | N/A | Complied |
| Grade 7 | 175 | 180 | - | 180 | N/A | Complied |
| Grade 8 | 175 | 180 | - | 180 | N/A | Complied |

** The Charter School did not apply for Form J-13A emergency closure days.*

*See the accompanying note to the other supplementary information.*

## PURPOSE OF SCHEDULE OF INSTRUCTIONAL TIME

This schedule presents information on the amount of instructional time offered by the Charter School and whether the Charter School has complied with the provisions of *California Education Code,* Sections 43501, 43502, and 43504.

**OTHER REPORTS SECTION**

**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS***

To the Board of Directors
Sherwood Montessori
Chico, California

We have audited in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America, the financial statements of Sherwood Montessori (the Charter School), which comprise the statement of financial position as of June 30, 2021; the related statements of activities and cash flows for the year then ended; and the related notes to the financial statements; and have issued our report thereon dated January 28, 2022.

### *Internal Control Over Financial Reporting*

In planning and performing our audit of the financial statements, we considered the Charter School's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Charter School's internal control. Accordingly, we do not express an opinion on the effectiveness of the Charter School's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the Charter School's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over financial reporting was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit, we did not identify any deficiencies in internal control over financial reporting that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

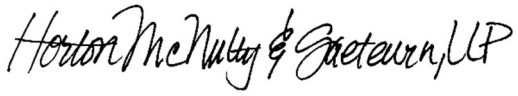
**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS***
(Continued)

### *Compliance and Other Matters*

As part of obtaining reasonable assurance about whether the Charter School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards.*

### *Purpose of This Report*

The purpose of this report is solely to describe the scope of our testing of internal control and compliance, and the results of that testing, and not to provide an opinion on the effectiveness of the Charter School's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Charter School's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.



January 28, 2022
Chico, California

## INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE

To the Board of Directors
Sherwood Montessori
Chico, California

### Compliance

We have audited Sherwood Montessori's (the Charter School) compliance with the types of state compliance requirements described in the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel, for the year ended June 30, 2021. The applicable state compliance requirements are identified in the table below.

### *Management's Responsibility*

Compliance with the requirements referred to above is the responsibility of the Charter School's management.

### *Auditors' Responsibility*

Our responsibility is to express an opinion on the Charter School's compliance with the state laws and regulations based on our audit.

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel. Those standards and the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the compliance requirements referred to above that could have a material effect on compliance with the state laws and regulations described in the schedule below occurred. An audit includes examining, on a test basis, evidence supporting the Charter School's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances. We believe our audit provides a reasonable basis for our opinion. Our audit does not provide a legal determination of the Charter School's compliance with those requirements.

**INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE**
(Continued)

| June 30, 2021 | Procedures Performed |
|---|---|
| **LOCAL EDUCATION AGENCIES** | |
| Attendance and distance learning | Yes |
| Teacher certification and misassignments | Not applicable |
| Kindergarten continuance | Not applicable |
| Instructional time | Yes |
| Instructional materials | Not applicable |
| Ratios of administrative employees to teachers | Not applicable |
| Classroom teacher salaries | Not applicable |
| Early retirement incentive | Not applicable |
| Gann limit calculation | Not applicable |
| School accountability report card | Not applicable |
| K-3 grade span adjustment | Not applicable |
| Apprenticeship: Related and supplemental instruction | Not applicable |
| Comprehensive school safety plan | Not applicable |
| District of choice | Not applicable |
| **SCHOOL DISTRICTS, COUNTY OFFICES OF EDUCATION, AND CHARTER SCHOOLS** | |
| **School Districts, County Office of Education, and Charter Schools** | |
| California Clean Energy Jobs Act | Yes |
| Proper expenditure of education protection account funds | Yes |
| Unduplicated local control funding formula pupil counts | Yes |
| **Charter Schools** | |
| Independent study-course based | No |
| Attendance | Yes |
| Mode of instruction | Yes |
| Nonclassroom-based instruction/independent study | No |
| Determination of funding for nonclassroom-based instruction | No |
| Charter school facility grant program | No |

Since the Charter School did not participate in the following programs during 2020-21, all steps related to them were not performed:

Independent study-course based
Charter school facility grant program

**INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE**
(Continued)

Since the Charter School was not classified as a nonclassroom-based charter school as of the 2019-20 fiscal year, all steps related to the following were not performed:

Nonclassroom-based instruction/independent study
Determination of funding for nonclassroom-based instruction

### *Opinion on State Compliance*

In our opinion, the Charter School complied, in all material respects, with the state compliance requirements referred to above that are applicable to the Charter School for the year ended June 30, 2021.

### *Other Matters*

The results of our auditing procedures disclosed instances of noncompliance with the state compliance requirements referred to above that are required to be reported in accordance with the *2020-21 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting,* which are described in the accompanying schedule of findings as items 2021-001 and 2021-002. Our opinion on state compliance is not modified with respect to these matters.

### *Charter School's Response to Findings*

The Charter School's response to the noncompliance findings identified in our audit is described in the accompanying schedule of findings. The Charter School's response was not subjected to the audit procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

Horton McNulty & Gaeteurn, LLP

January 28, 2022
Chico, California

# FINDINGS SECTION

## ATTENDANCE AND DISTANCE LEARNING (Tiered Reengagement Plan)

10000 (2021-001)

### State Compliance

***Condition*** The Charter School's written tiered reengagement plan did not include all required elements. During our review of the plan, we noted that the plan does not include a process to transition the pupil to full-time in-person instruction where feasible.

In our inquiries with the Charter School, the Charter School noted that the above areas were performed as part of the reengagement process; however, they were not formally documented in the written tiered reengagement plan.

***Criteria*** *California Education Code*, Section 43504(f)(2) requires LEAs to develop written procedures for tiered reengagement strategies for all pupils who are absent from distance learning for more than three schooldays or 60% of the instructional days in a school week. The procedures shall include, but are not limited to: verification of current contact information for each enrolled pupil; daily notification to parents or guardians of absences; a plan for outreach from the school to determine pupil needs including health and social services as necessary; and transitioning the pupil to full-time in-person instruction, when feasible.

***Effect*** The Charter School was not in compliance with the provisions of *California Education Code*, Section 43502(h)(2). The penalty calculated pursuant to *California Education Code*, Section 43504(i)(2), is calculated to be $268. The District is required to return principal apportionment funding totaling $268 to the California Department of Education. The calculation is displayed below:

| Year Ended June 30, 2021 | Grades K-3 | Grades 4-6 | Grades 7-8 | Grades 9-12 | Totals |
|---|---|---|---|---|---|
| Days out of compliance | 5 | - | - | - | 5 |
| Number of days required to be offered | 175 | 175 | 175 | 175 | |
| Derived value of ADA by grade span | $ 9,365.03 | $ 8,610.59 | $ 8,866.11 | $ 10,542.41 | |
| **Distance Learning Penalty** | $ 268 | $ - | $ - | $ - | $ 268 |

***Cause*** Although the Charter School had a written tiered reengagement plan in place, the Charter School was not aware of the requirements for specific elements to include in the written plan.

***Recommendation*** We recommend that the Charter School continue to monitor new requirements to ensure compliance. If the Charter School offers independent study for the 2021-22 fiscal year, the Charter School should review and amend the tiered reengagement plan to include all required elements needed for compliance with *California Education Code*, Section 51747(d).

***Response*** The Charter School's administration will adopt procedures during the 2021-22 fiscal year to comply with the recommendation.

**STATE COMPLIANCE (Unduplicated Local Control Funding Formula Pupil Counts)**
40000 (2021-002)

## State Compliance

***Condition*** During our testing over compliance of the unduplicated Local Control Funding Formula (LCFF) pupil counts, using a random sample to achieve a high level of assurance for each population, we identified the following:

One of one students selected for testing that were reported as both Free and Reduced Price Meal student and English Learner, did not have support on file for at least one of these designations.

The above student did not qualify for the unduplicated LCFF pupil count as of the October 7, 2020, census date, however, they were included in the California Longitudinal Pupil Achievement Data System (CalPADS) 1.18 – FRPM/English Learner/Foster Youth – Student List.

Results of testing and extrapolation of the identified errors to each population are as follows:

| June 30, 2021 | FRPM | EL | FRPM and EL | Totals |
|---|---|---|---|---|
| **Schedule of Unduplicated Pupil Counts** | | | | |
| Certified total unduplicated pupil count | 69 | 1 | 6 | 76 |
| Audit adjustment: | | | | |
| Known error | - | - | (1) | (1) |
| Extrapolation | - | - | (1) | (1) |
| **Adjusted Total Unduplicated Pupil Counts** | 69 | 1 | 4 | 74 |
| Certified enrollment count | | | | 122 |

***Criteria*** Pursuant to California Education Code, Section 42238.02(b)(2), the Charter School shall annually submit its enrolled free and reduced-price meal eligibility, foster youth, and English Learner pupil-level records for enrolled pupils using CalPADS. All support for these designations must be kept on file.

***Effect*** The unduplicated LCFF pupil count reported in the CalPADS 1.18 – FRPM/English Learner/Foster Youth – Student List was overstated by two students. As a result, the Charter School's 2020-21 second principal apportionment was overstated by $1,089, calculated as follows:

| June 30, 2021 | | |
|---|---|---|
| **Effect of Unduplicated Pupil Count Adjustments on State Aid** | | |
| Certified unduplicated pupil percentage | | 0.5586 |
| Adjusted unduplicated pupil percentage | | 0.5540 |
| Supplemental grant funding as originally reported | $ | 132,234 |
| Audit adjustment | | (1,089) |
| **Adjusted Supplemental Grant Funding** | $ | 131,145 |
| Concentration grant funding as originally reported | $ | - |
| Audit adjustment | | - |
| **Adjusted Target Concentration Grant Funding** | $ | - |
| **Overstatement of 2020-21 Second Principal Apportionment** | $ | 1,089 |

The Charter School is required to return funding totaling $1,089 from the second principal apportionment to the California Department of Education.

***Cause*** The cause for the misstatements in the reported CalPADS data is unknown.

***Recommendation*** We recommend that funding totaling $1,089 be returned to the California Department of Education. We also recommend that the District review the annual CalPADS 1.18 – FRPM/English Learner/Foster Youth – Student List as of the census date to determine that the unduplicated pupil count is accurate and properly supported by underlying documentation prior to submitting this data to CalPADS.

***Response*** The Charter School's administration will adopt procedures during the 2021-22 fiscal year to comply with the recommendation, and will return funding totaling $1,089 to the California Department of Education.

None.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Instructional Staff Report**

**Date:** February 17, 2022

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***Instructional Staff was asked to respond to the question:*** *What do the teachers and instructors need? This can be what we need from the Board, but it can also be what we need in general, even if it's beyond the scope of what the Board can do for us. Sometimes it can be helpful just to express what our wishes and frustrations with needs unmet are.*

**Transitional Kindergarten/Kindergarten -Teresa Shippen**

In response to our prompt for this month's report "What do the teachers and instructors need?" I would like to answer with New Bathrooms!!
Our bathrooms are in a state of disrepair. The roof in the girls room looks like it is about to fall in! It has been patched and patched again by the district, but it continues to leak on rainy days. Many of the younger students will not use this stall!

The boys' room has only one stall and one urinal. I have noticed that very few boys feel comfortable using the urinal as it lacks privacy. There is always a long line of boys waiting for the one stall. It would be nice if it could match the girls and have at least three stalls and both bathrooms could use three sinks to speed up the hand washing process. Having at least one sink and toilet that is at a kinder level would help our little students who currently use a step stool to access the facilities. Of course, if more stalls and sinks could fit in the space, that would be ideal!
If we are staying on this campus, suitable bathrooms would be my number one need!

On an easier note, I think it would be fun to find an area to paint a 100's board outside on the black top! We just had an inspiring professional development training in math, and I enjoyed the outside math that could be taught with a giant 100's board! Think skip counting by twos, fives or tens while practicing the large motor skills of hopping, jumping or leaping. This, of course, is not a "need" but it would be wonderful to have!

**1st/2nd -Kim Powers**

Hello board! Thank you so much for this opportunity. I really feel very well taken care of here at Sherwood, and I think the school's leaders do an excellent job taking care of the children here as well. At first blush, there isn't anything I feel is absolutely necessary to obtain that the school doesn't already have. I think we are very fortunate to have so many support staff this year. The school is able to offer quite a large amount of discretionary money for

teachers to use on classroom supplies. The administration consistently offers professional development opportunities, and they keep the facilities in good working order. If I start to dream of things that I think would be nice to have, I think a larger office space would be nice - or additional facilities for our support staff. I think Michelle deserves to have an appropriate principal's office. I think the school may benefit from more storage space. It would be super awesome to be able to have a large capacity laminating machine, and I think it would also be wonderful to have windows in the classrooms. The walkie talkie system is a great solution for all-campus communication, but I think having a phone system would be nice. I don't like having to use my personal cell phone to contact the office, and when the office is trying to contact me, I don't have my ringer on and miss things. As a dream or wish, I would like to be able to hire support staff/classroom aides that have Montessori training. Overall, I think we have a really great school with many wonderful resources.

**1st/2nd/3rd -Marlo Knox**

This board report is designed to answer the prompt our director shared with us; What do teachers and instructors need? To answer this question I must establish context. We, Sherwood Montessori, have designed an environment where everyone is encouraged to speak honestly and openly about what they need. I feel comfortable seeking help. Therefore, my needs are often met. I start with my instructional assistant whenever possible. Joy Duggan is particularly talented, resourceful, and observant so daily routines move forward in true partnership. She even possesses the particularly coveted skill of anticipating needs. I speak directly to any specialist, supporting adult, or fellow lead teacher I am working with. I ask for things, I share practices we are using in my class, I state my expectation, ask questions, and as often as possible I explain where I am leading my class and why. I reach out to each member of the administrative staff directly, freely, knowing if any request is outside of their realm of expertise they will let me know. Most recently I am going to families and parents with my visions for our children and ideas about the quality of the environment I want to create. The board may be reading this assuming my freedom in requesting, asking for help, involving others, means I always get what I want. You would be wrong. There are "no's", differences of opinions, misunderstandings, questions about requests, recommendations, unknowns. The magic of working in an environment where people can be honest and transparent, especially about their needs, is the conversations, the process, the creativity. It is not about getting what you want, although that happens a lot, it's about how you get what you need, and how you achieve that desired outcome, so that the entire community functions with a sense of unity. We are they, you are me, we are better together.

The above being said, I have dreams too, big needs and desires, that are ever present in my mind. I would like to participate in a program where I would spend a summer working on my Montessori credential. I currently hold a certificate to teach in a lower elementary classroom. The cost of the program and the logistics of travel, food and lodging is something I believe the school should invest in. The monetary investment of making something like that happen brings up another need. When I was hired in the 2013/2014 school year I was given credit for 10 years of teaching. I have been teaching since 1992. I believe I possess the skills and have shown my commitment to the Sherwood community in such a way that I might now, after many committed years, be compensated financially for all my years of teaching service. Yes, I am saying I need a raise. The most recent change in teacher compensation did not change my salary beyond what I

would see any other school year. Finally, a prepared environment takes large amounts of time. Planning time is limited. If there was any way to increase the time available to teachers, within their contract, to prepare that would be extremely helpful.

Thank you for your work. Thank you for creating an environment where conversations can happen.

**1st/2nd /3rd -Anne Adams**

This month, we've been asked to talk about needs, whether or not they're within the scope of the Board's authority.

The good news is, most of the practical daily needs that arise in our classroom are being met by our competent team of support and admin staff. Hence, those are not the needs that haunt me.

The things that I do worry about at the end of the day are pervasive societal phenomena that can harm children--particularly unstable conditions at home, negative messages in media, and overexposure to said media. I doubt a child's ability to get into a positive learning routine if their housing conditions, their food security, or their physical safety are threatened repeatedly at home (as they were for many during Covid and Camp Fire). I worry that it may warp a child's mind to play first-person-shooter video games or watch massacres in movies. And I worry that kids' books that "humorously" depict teachers and students as adversaries may actually damage a child's real classroom experience.

So, Board, would you mind quickly saving the world? Just kidding. Those issues will probably continue to inform how I curate positive media for my classroom to try to counteract widespread cultural harm.

As for needs which are within the Board's purview, I may have one in the longer-term future as the school's needs evolve--namely, to return to the 9-12 age group. In my relatively new teaching career, I've twice joined a team as an Upper Elementary teacher, and then been moved into a Lower Elementary classroom to fill a vacancy. While there are advantages to teaching either age group, and I'm very invested in the success of my current Lower El cohort, I do sometimes fantasize about guiding a well-prepared group of Upper El students into the refinement of the skills they've already acquired in Lower El. For now, this is just an FYI. I'm not trying to make a leap, but I may eventually desire to make a move.

Thanks again for all that you do. I'm very happy to be a part of the Sherwood community**.**

**4th /5th/6th -Jessi Lusardi**

I would like to have the bathroom on the main campus fixed. It may be out of the scope of the board, but the ceiling is a safety concern, and it is also quite cold in there for part of the year. It would also be nice to have a teacher only bathroom.

The gate which faces 20th street park is also a safety concern. While I haven't seen anyone come in the gate who isn't supposed to, I have seen students try and walk (or run) out of the gate. That parking lot also gets a lot of interesting characters, and so it might be a good idea to have a buzzer or a crash bar on the gate.

I really appreciate that Heather has been sending out emails each day to the entire campus regarding who is here and who is covering for our staff. That kind of communication is so important to our entire staff logistics. I am sure that I am forgetting something, but will

definitely email it if I think of more. Thank you for asking this important question!

**4th /5th /6th-April Pearce**

**7th/8th-Michael Whittemore**

Things the middle school could use I think is possibly an aide, or a support teacher once in a while. Even though the numbers do not support it, ideally it would be nice so that way we would be able to get deeper into our projects and it would help the students focus more to know that there is another set of eyes on them, but also another form of support in the classroom. Again, this is not necessarily needed just something that would be of benefit to myself as well as the students.

For most every other situation, I have had my needs fulfilled by the school and as I develop my skills and projects, because of the support I have received, I know the school support will be there. Thank you.

**MTSS-Molly Makel**

1) I believe our school needs a standard math curriculum used across all grade levels to complement the Montessori materials we have and to help bring our test scores up.

2) I also believe we need a full-time general education math intervention teacher to target students needing extra help, but who don't necessarily need or qualify for special education services. This intervention teacher will need some kind of intervention math curriculum, So, at the very least, the school-wide general education math curriculum should include reteach/extra practice sections that can be used by this teacher. Ideally this teacher would have their own classroom where they could pull scheduled groups of students daily and keep materials stored and organized, but I understand that our physical space is limited.

3) In addition, I believe we need to make our current reading intervention specialist a full-time employee, who can pull more groups and/or spend more time with existing groups of students identified for language arts intervention. She has seen great success with the program she is using and I believe our school would benefit from expanding it.

4) We need a more robust school-wide PBIS plan to assist with targeting behaviors at the tier 1 level before students need more intensive behavior intervention. The behaviors lately have been extremely challenging, and luckily we have employed the help of an ABA behaviorist, who I'm hoping can continue to assist us in this area.

**Extended Day-Brenda Brown**

After some consideration I have discovered that all my needs as the Lead Assistant and Aftercare Coordinator have been met! As the Lead Assistant I've been given time, materials, and training to provide the teacher's assistants with the tools they need to be more successful. As the Aftercare Coordinator I was entrusted with a space to create my vision of a Montessori

Aftercare program and everything that I needed and desired from Montessori materials, staff, down to the Barbies was given to me, thank you!

However, I did learn some sad news this week. Michelle informed me that my beloved room that I have worked so hard on has to be given back to Chapman at the end of this school year. I'm hopeful that my needs for next year will be considered so I'll be able to continue to have adequate space in order to once again create a beautifully prepared Montessori environment for the 22/23 school year.

As a member of our P.B.I.S. team I think we have some needs to consider. One of the things that needs to be completed in order to have more success with positive behavior is to create the P.B.I.S. right way vs. wrong way videos. These videos are important but we NEED time, materials, and pay for the people involved in order to move forward.

Thank you for taking the time to read this and for considering all our needs with an open heart and mind.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** February 17, 2022

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**Administrative**

- Updated enrollment will be reported at the meeting.
- Our Reading Intervention Instructor, Maribel De La Cerda, shared assessment results that showed a trend of students making excellent growth in the program. Eight students were exited from the program due to reaching the end goal.
- We are hiring for two paraprofessional aide positions and one Extended Day program position.
- We had the first of two professional development sessions on rigor in mathematics using Montessori methods titled *Moving Montessori Math Forward.*
- On February 8 we had our third of four Town Hall meetings with topics including: COVID rates in Butte County, vaccination mandates and exemptions, planned expansion of TK in California, and ways to become involved and give feedback for school planning and improvement were shared.
- Negotiations with CUSD resulted in one fewer classroom under Prop 39 for the 2022-2023 school year.

**Safety**

- Testing for COVID was taking a lot of time this month, but now seems to be tapering off.
- Student and staff absences for COVID illnesses and exposures followed a similar trajectory, peaking and then recently declining.
- We are expecting an announcement about mask wearing in schools by the time of this Board meeting.

**Legislative/Legal/Compliance**

- Several bills have been introduced and are expected to be signed into law that will ensure flexibility of ADA calculation is extended to charter schools in California.
- I attended a webinar titled Mastering Employee Leaves and Accommodations. Even when a pandemic is not happening, this is a complex topic. Recent legislation has extended paid leave for full-time employees who have to miss work due to COVID illness or exposure.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Treasurer's Report**

**Date:** February 17, 2022 Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of January 2022 reconciled with and matched those of the school's internal reports. The New Balance totaled $ 990,539.83 as of January 31, 2022 for the checking account and $50,000 in the special account which will moved back to the checking account once the contract work at 1010 Cleveland is signed off by the county.
- There were no unexpected high-cost expenses in November.

Profit & Loss

- The December Profit & Loss report shows a Net Income of -$172,184 which is offset by January LCF funds totaling $61,595 deposited in February along with Grant funds of $12,732.

Cash Flow

- Assuming all Federally allocated funds are received and P1 is at least 100 ADA, the school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Balance Sheet - Current Month
**Accrual Basis** — As of January 31, 2022

| | Jan 31, 22 |
|---|---|
| **ASSETS** | |
| **Current Assets** | |
| **Checking/Savings** | |
| **9100-Assets** | 954,260 |
| **Total Checking/Savings** | 954,260 |
| **Accounts Receivable** | |
| **9200-Accounts Receivable** | 10,677 |
| **Total Accounts Receivable** | 10,677 |
| **Other Current Assets** | |
| **9290 - Due from Grantor Govts.** | -54,246 |
| **9340-Security Deposit** | 50,000 |
| **Total Other Current Assets** | -4,246 |
| **Total Current Assets** | 960,691 |
| **Fixed Assets** | |
| **9410 - Land** | 95,000 |
| **9430- Building** | 182,515 |
| **9435-Accumulated Depreciation** | -21,786 |
| **Total Fixed Assets** | 255,729 |
| **TOTAL ASSETS** | **1,216,420** |
| **LIABILITIES & EQUITY** | |
| **Liabilities** | |
| **Current Liabilities** | |
| **Credit Cards** | |
| **SHERWOOD COSTCO VISA** | 1,264 |
| **Total Credit Cards** | 1,264 |
| **Other Current Liabilities** | |
| **9500-Liabilities** | 176,922 |
| **Total Other Current Liabilities** | 176,922 |
| **Total Current Liabilities** | 178,186 |
| **Total Liabilities** | 178,186 |
| **Equity** | |
| **Restricted Assets** | 364,551 |
| **Unassigned/Unaapproriated** | 845,867 |

| | Jan 31, 22 |
|---|---|
| **Net Income** | -172,184 |
| **Total Equity** | 1,038,234 |
| **TOTAL LIABILITIES & EQUITY** | **1,216,420** |

# Sherwood Montessori
## Profit & Loss YTD Comparison
July 2021 through January 2022

| | Jul '21 - Jan 22 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 869,303 |
| **Total Income** | 869,303 |
| **Gross Profit** | 869,303 |
| **Expense** | |
| **1000 Certificated Salaries** | 355,455 |
| **2000 Classified Salaries** | 256,147 |
| **3000-Employee Benefits** | 192,729 |
| **4000-Books and Supplies** | 59,512 |
| **5000 Services/Other Op. Exp.** | 177,644 |
| **Total Expense** | 1,041,487 |
| **Net Ordinary Income** | -172,184 |
| **Net Income** | **-172,184** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**January 2022**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 01/04/2022 | DBT | Amazon.com | 2 step stools for kids | Instructional Supplies | 72.86 |
| Check | 01/04/2022 | DBT | Amazon.com | 2 step stools | Instructional Supplies | 79.26 |
| Check | 01/04/2022 | DBT | Amazon.com | School supplies | Instructional Supplies | 115.53 |
| Check | 01/04/2022 | 9333 | Barbara Mandelbaum | GRANT SUMMARY-FOLLOWU... | Grant Services | 1,050.00 |
| Check | 01/05/2022 | 9334 | Advanced Document | DEC Copier service | Copier Lease | 476.77 |
| Check | 01/05/2022 | 7271 | Lauren Inthavong | Livescan | LiveScan and TB Test Servic... | 64.00 |
| Check | 01/05/2022 | EFT | California Water Service Comp... | December service | Water | 38.40 |
| Check | 01/05/2022 | EFT | Comcast 4454 | DECEMBER-JANUARY SERVICE | Internet Service Provider | 226.44 |
| Check | 01/05/2022 | EFT | T Mobile Hot Spot | December Hotspot | Wifi - Distance Learning | 90.00 |
| Cred... | 01/05/2022 | | ZOOM | ZOOM Meetings | ONLINE MEETING PROVID... | 157.40 |
| Check | 01/05/2022 | DBT | Amazon.com | Masks | PPE | 21.40 |
| Check | 01/05/2022 | DBT | Amazon.com | Brita filters | PPE | 21.98 |
| Check | 01/05/2022 | DBT | Amazon.com | Brita filters | PPE | 21.98 |
| Cred... | 01/07/2022 | | Mendes Supply Co. | Towels - Bond copy paper - Soap | Custodial Supplies | 339.74 |
| Check | 01/07/2022 | 7258 | KEVIN KILLION | 1010 Cleveland Landscaping - a... | Fundraising Expenses | 1,000.00 |
| Check | 01/07/2022 | ACH | CharterSAFE | 21-22 P&L PREMIUM 5 | 5400-Liability Insurance | 2,642.00 |
| Check | 01/07/2022 | ACH | CharterSAFE | 21-22 WC PREMIUM 5 | 3601-Workers Comp | 750.00 |
| Cred... | 01/09/2022 | | Microsoft | Subscription | Software Licensing | 6.50 |
| Check | 01/10/2022 | DBT | Best Buy | Samsung 27 inch monitor | Computers and Electronics | 249.48 |
| Check | 01/11/2022 | DBT | Amazon.com | 10 Blood on the River | 4200-Books/reference Materi... | 82.50 |
| Check | 01/11/2022 | DBT | Amazon.com | 10 Blood on the River | 4200-Books/reference Materi... | 82.50 |
| Check | 01/11/2022 | DBT | Target | Snacks | Food (Instructional) | 137.22 |
| Check | 01/11/2022 | DBT | Target | Snacks | Food (Instructional) | 19.98 |
| Check | 01/11/2022 | 9338 | R&R Horn Contractors | REPAIR SEWER LINE | Contracted Service | 4,700.00 |
| Check | 01/11/2022 | DBT | Amazon.com | RM | Instructional Supplies | 150.08 |
| Check | 01/11/2022 | DBT | Amazon.com | RM | Instructional Supplies | 128.64 |
| Check | 01/12/2022 | DBT | Amazon.com | Paradise Found | 4200-Books/reference Materi... | 22.51 |
| Check | 01/12/2022 | DBT | Amazon.com | 18 black retractable erasable gel... | Office Supplies | 18.22 |
| Check | 01/12/2022 | DBT | Amazon.com | Music books | Instructional Supplies | 42.88 |
| Check | 01/13/2022 | DBT | Costco | Snacks and kitchen bags | Food (Instructional) | 398.98 |
| Check | 01/13/2022 | DBT | Costco | Snacks and kitchen bags - tip | Food (Instructional) | 1.00 |
| Check | 01/13/2022 | DBT | Target | Snacks | Food (Instructional) | 90.40 |
| Check | 01/13/2022 | DBT | IXL | Math, Language arts, Science, A... | 5300-Dues and Membership | 35.95 |
| Check | 01/14/2022 | EFT | COSTCO VISA CARD | DECEMBER-JANUARY 15TH P... | SHERWOOD COSTCO VISA | 1,313.88 |
| Check | 01/18/2022 | DBT | Amazon.com | Music books | Instructional Supplies | 85.76 |
| Check | 01/19/2022 | EFT | PG & E | December Service | Electricity | 679.82 |
| Check | 01/19/2022 | 9339 | Chico Country Day | NATALIE WREN - NURSE -Inv ... | Contracted Service | 1,242.47 |
| Check | 01/19/2022 | 9340 | Chico Country Day | NATALIE WREN - NURSE -Inv ... | Contracted Service | 1,242.47 |
| Check | 01/19/2022 | 9341 | Hernandez Cleaning Service | INV 30375 | Housekeeping Services | 3,250.00 |
| Check | 01/19/2022 | 9342 | Macquarie Equipment Capital I... | Kyocera Copier Lease - INV 20982 | Copier Lease | 220.94 |
| Check | 01/19/2022 | 9343 | Law Offices of Young, Minney ... | Draft Letter re ADA-INV 74712 | Attorney | 476.42 |
| Check | 01/19/2022 | 9344 | Marlo . Knox | Supplies | Instructional Supplies | 109.98 |
| Check | 01/19/2022 | EFT | Laura Swanson {Other} | DEC-JAN Supervision 12-21x3 1... | Contracted Service | 560.00 |
| Check | 01/19/2022 | EFT | Verizon Wireless | Dec-Jan service | Telephone, Cellular | 99.89 |
| Check | 01/19/2022 | EFT | Waste Management | December-SERVICE | Trash/Recycling | 128.68 |
| Check | 01/19/2022 | 9345 | San Joaquin County Office of ... | EDJOIN account fees 1 year | Advertising | 1,200.00 |
| Check | 01/19/2022 | EFT | Comcast Business 9110 | DECEMBER-JANUARY | Internet Service Provider | 308.51 |
| Check | 01/19/2022 | DBT | Wufoo | DECEMBER SERVICE | Online List Management | 19.00 |
| Check | 01/19/2022 | DBT | Amazon.com | Barbie babysitting playset with s... | Extended Day | 23.58 |
| Check | 01/19/2022 | DBT | Amazon.com | Music book | Instructional Supplies | 21.44 |
| Check | 01/19/2022 | DBT | Amazon.com | | Instructional Supplies | 42.88 |
| Check | 01/20/2022 | DBT | Amazon.com | Barbie skipper babysitters | Extended Day | 12.32 |
| Check | 01/20/2022 | ACH | HP LEASE 7603 | Lease Payment - Customer ID 7... | HP DIRECT LEASE | 316.21 |
| Check | 01/21/2022 | DBT | Amazon.com | White Chalk Board Chalk | Extended Day | 34.28 |
| Check | 01/24/2022 | DBT | Amazon.com | Prime Monthly Fee | 5300-Dues and Membership | 13.93 |
| Check | 01/24/2022 | DBT | Amazon.com | Music books - 10 | Instructional Supplies | 214.40 |
| Check | 01/24/2022 | DBT | Amazon.com | MUSIC BOOKS | Instructional Supplies | 21.44 |
| Check | 01/25/2022 | DBT | Big Life Journal | 2022 Calendar | Office Supplies | 48.77 |
| Check | 01/26/2022 | DBT | Costco | Snacks and kitchen bags - tip | Food (Instructional) | 380.50 |
| Check | 01/26/2022 | DBT | WINCO FOODS | Middle school science project | Food (Instructional) | 7.54 |
| Check | 01/26/2022 | DBT | Amazon.com | Hepa filters | PPE | 257.38 |
| Check | 01/26/2022 | DBT | Amazon.com | | Instructional Supplies | 24.66 |
| Check | 01/27/2022 | DBT | Growing up Chico | Business card ad | Advertising | 200.00 |
| Check | 01/27/2022 | DBT | Amazon.com | File folders | Office Supplies | 14.14 |
| Check | 01/27/2022 | DBT | Amazon.com | Barbie and Ken fashionistas | Extended Day | 32.15 |
| Check | 01/27/2022 | DBT | Amazon.com | 50-two pocket folders | Office Supplies | 32.16 |
| Check | 01/27/2022 | DBT | Amazon.com | Blank index cards | Instructional Supplies | 8.85 |
| Check | 01/27/2022 | EFT | Teresa Shippen | SUPPLIES | Instructional Supplies | 370.83 |
| Check | 01/27/2022 | DBT | Amazon.com | | Instructional Supplies | 18.93 |
| Check | 01/28/2022 | DBT | Amazon.com | Face masks | PPE | 321.74 |
| Check | 01/28/2022 | EFT | Pat H. Casey | Annual Fee | Intuit Payroll Service | 650.00 |
| Check | 01/28/2022 | DBT | Walmart | 53 Q touch - trash can | Instructional Supplies | 15.94 |
| Check | 01/29/2022 | DBT | 1 & 1 Internet Inc. | Internet hosting | Website, Hosting | 45.00 |
| Check | 01/30/2022 | DBT | Amazon.com | Instant cold pack | Instructional Supplies | 14.91 |
| Check | 01/30/2022 | DBT | Amazon.com | Water bottle stickers for kids - 300 | Instructional Supplies | 15.00 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Bill | 01/31/2022 | 2021/... | Pat Casey | CONTRACT SERVICES-2021/2... | Business Manager Services | 4,000.00 |
| Check | 01/31/2022 | DBT | Law Offices of Young, Minney ... | Employee leave | Attorney | 40.00 |
| Check | 01/31/2022 | DBT | Costco | Snacks | Food (Instructional) | 294.83 |
| Check | 01/31/2022 | DBT | Costco | Bags | Custodial Supplies | 56.97 |
| Check | 01/31/2022 | DBT | Costco | Kitchen supplies | Kitchen and garden | 11.69 |
| Check | 01/31/2022 | DBT | Costco | Clorox wipes | Office Supplies | 14.99 |
| Check | 01/31/2022 | DBT | Amazon.com | Face masks | PPE | 16.08 |
| Check | 01/31/2022 | DBT | Amazon.com | Double sided draft paper | Instructional Supplies | 14.61 |
| Check | 01/31/2022 | DBT | Amazon.com | | Instructional Supplies | 15.00 |
| Check | 01/31/2022 | DEBIT | Harry Yasko | EFT/ACH DEBIT NCNBBP:WBP... | Instructional Supplies | 25.24 |
| Check | 01/31/2022 | | | Service Charge | Bank Fees | 27.00 |
| **TOTAL** | | | | | | **31,947.81** |

To:Board of Directors

From: Marta Taylor, SMPO Public Relations Coordinator
Subject: Sherwood Montessori Parents Organization

Report Date: February 17, 2022

Hello board members, SMPO has not had much action since the beginning of the year. The two events we had planned, had to be unfortunately canceled due to the high rise of COVID exposures in our community, and our own.

We are hoping to get those events rescheduled, however we still have some fun events ahead of us: Variety Show (4/29) ,  Teacher Appreciation Day (5/3) and Bike to School Day (5/4).

SMPO is working hard and ready to shift plans in this unprecedented time. The safety of our students and community is our main priority.

Lastly, Jennifer Henz (parent of Jack Gross) has volunteered to help run the elections for out board members this year!

Best regards,

SMPO

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Supplemental Annual Update**

**Date:** February 17, 2022

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**SUMMARY**

California LEAs are required to present this report to their governing body by February 28th, 2022.

**DISCUSSION**

Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the annual update to the 2021–22 LCAP and budget overview for parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting the LEA must include all of the following:

- Update on the Budget Overview for Parents
- The Supplement for the Annual Update for the 2021–22 LCAP;
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

**ACTION REQUESTED**

Receive report.

Attachments: Slide presentation and Supplemental Annual Update


Mid-Year LCAP Update
February 17, 2022
Sherwood Montessori

# Background

Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the annual update to the 2021–22 LCAP and budget overview for parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting the LEA must include all of the following:

- Update on the Budget Overview for Parents
- The Supplement for the Annual Update for the 2021–22 LCAP;
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

# Impact to the Budget Overview for Parents

When Sherwood Montessori adopted our LCAP and Budget on June 17 , 2021, the state budget act was not complete.  The adopted state budget included additional funds that were not anticipated by our LEA. The impact to our adopted Budget Overview for Parents is as follows:

| Item | As adopted in BOP | Actual 21-22 Budget Amount | Difference |
|---|---|---|---|
| Total LCFF Funds | $823,335 | $1,001,504 | $178,169 |
| LCFF Supplemental/ Concentration Grants | $107,721 | $ 99,505 | -$8,216 |
| All other state funds | $109,475 | $304,434 | $194,959 |
| All Federal Funds | $12,000 | $106,000 | $94,000 |
| Total Projected Revenue | $1,314,927 | $1,411,938 | $97,011 |
| Total Budgeted General Fund Expenditures | $1,418,682 | $1,651,883 | $233,201 |

# Supplement for the Annual Update for the 2021–22 LCAP

**The Supplement has five prompts:**

1. A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021–22 Local Control and Accountability Plan (LCAP).
2. A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.
3. A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.
4. A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation. [i.e., the ESSER III Plan]
5. A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA's 2021–22 LCAP and Annual Update.

# Prompt 1: Educational Partner Engagement for Budget Act funds:

- *Educator Effectiveness Block Grant*
- *Expanded Learning Opportunities Program*
- *Elementary and Secondary School Emergency Relief (ESSER) funds*
- *Title One Funds*

Town Hall Meetings
Exit Surveys
Community Surveys
LCAP Focus Group
Presentations at Board Meetings

# Prompt 2: Use of additional Concentration Funding:

Sherwood will use concentration grant addon funding to provide staff to offer free tutoring and care after school for students. The additional funding allow us to modify the 2021-2022 LCAP goal of offering free or low-cost care for students to free care for all students. The additional funding also allows us to continue the program longer than just this 2021-2022 school year.

# Prompt 3: Educational Partner Engagement for One-Time Federal Funds:

- Community Surveys since 2014
- Surveys for COVID response and safe reopening
- Zoom meetings evolved into Town Hall Meetings
- Focus Group
- Public Board Meetings

# Prompt 4: Implementation of the ESSER III Expenditure Plan:

**SUCCESSES**

- The Extended Day Program is very popular!
- Teachers and staff have been enjoying increased opportunities for professional development
- COVID testing has been helpful in finding positive cases before they have a chance to spread

**CHALLENGES**

- Onerous amounts of time spent writing specific plans and reports
- Federal compliance for federal funding
- Little time has passed since implementation. The plan was adopted in September.

# Prompt 5: Using fiscal resources consistent with LCAP:

- Free childcare with tutoring and nutritious snacks
- Free nutritious snacks and meals throughout the day and after school
- Technology upgrades
- Small class sizes
- Early literacy program with Montessori materials
- Safety: masks, testing, air purifiers
- Wellness: cooking & gardening, counseling, expanded MTSS (Mulit-Tiered System of Support)

# Metrics - Mid Year Update

# LCAP Metrics

| Metric | 2020-21 Baseline | Desired Outcome for 2023-24 | 2021-22 Mid-Year Update | Status |
|---|---|---|---|---|
| Teachers Fully Credentialed | 100% | 100% | 100% | On Target |
| Sufficient Instructional Materials | 100% of all student have standard Aligned materials | 100% of all student have standard Aligned materials | 100% of all student have standard Aligned materials | On Target |
| School Facilities in Good Repair using FIT | Roof leaks in restroom and bathroom; recess & PE equipment replenished | 100% Good or Excellent on Facilities Inspection Tool (FIT) ; recess & PE equipment replenished | 100% Good or Excellent on Facilities Inspection Tool (FIT); recess & PE equipment replenished | On Target |

# LCAP Metrics

| Metric | 2020-21 Baseline | Desired Outcome for 2023-24 | 2021-22 Mid-Year Update | Status |
|---|---|---|---|---|
| Suspension Rate | 2.8% | 2.8% or lower | 2.25% | On Target |
| CAASPP Scores | 33.4 Points Below Standard in ELA 90 Points Below Standard in Math (2019) | 20 Points Below Standard for ELA 60 Points Below Standard for Math | unavailable | In Progress |
| Chronic Absenteeism | 14.44% | 10% or lower | 1.7% | On Target |
| School Community Survey | 77% Satisfied or Very Satisfied with Support Given to Struggling Learners | 80% Satisfied or Very Satisfied with Support Given to Struggling Learners | unavailable | On Target |

# LCAP Metrics

| Metric | 2020-21 Baseline | Desired Outcome for 2023-24 | 2021-22 Mid-Year Update | Status |
|---|---|---|---|---|
| Montessori Materials Inventories | Materials are in good repair; some classrooms need replacement materials. | All classrooms have a broad range of materials for the grade levels served. | Materials in storage are inventoried and materials needed for additional TK/K class have been set aside. | In progress |
| Parent Square | 100% parents contactable | 100% parents contactable | 97% parents contactable | In progress |
| Community Survey Results | 78% Satisfied or Very Satisfied with Opportunities School has Extended to Learn About Montessori Approach | 80% Satisfied or Very Satisfied with Opportunities School has Extended to Learn About Montessori Approach | unavailable | unavailable |

# LCAP Metrics

| Metric | 2020-21 Baseline | Desired Outcome for 2023-24 | 2021-22 Mid-Year Update | Status |
|---|---|---|---|---|
| Parent Volunteer Tracking System | 20% of parents met or exceeded 50 volunteer hours per year | 30% of parents met or exceeded 50 volunteer hours per year | 10% of parents have reported volunteer hours<br>1% of parents have exceeded 50 hours | In progress |
| Socioeconomically disadvantaged students will have access to free or reduced lunch, free after school tutoring, and free child care before and after school. | ELA 63 points below standard Math 124.3 points below standard | ELA 40 points below standard Math 90 points below standard | unavailable | In progress |

# Actions and Expenditure Update

# LCAP Goal 1 (cont.) - Actions & Expenditures

| **Action Title**<br>*Copy Action Title from LCAP* | **Budgeted Expenditure**<br>*Copy total Expenditure from LCAP* | **Estimated Actuals (1st Interim)** | **Implementation Note**<br>*Comment on Implementation Status* |
|---|---|---|---|
| 1.1 Provide highly qualified teachers for all students. | $1,500 | $1,000 | This is a regular annual duty to check the status of teachers' credentials. |
| 1.2 Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS) | $16,680 | $3,275 | In-person training and travel not feasible at this time. |
| 1.3 Provide a broad range of Montessori materials | $8,000 | $4,003 | Inventory has been created. |
| 1.4 Provide a facility in good repair and maintain recess equipment. | $7,700 | $8,315 | Grant money being used to develop garden and 1010 outdoor area for mental wellness of students through outdoor education. |

# LCAP Goal 1 - Actions & Expenditures

| **Action Title**<br>*Copy Action Title from LCAP* | **Budgeted Expenditure**<br>*Copy total Expenditure from LCAP* | **Estimated Actuals (1st Interim)** | **Implementation Note**<br>*Comment on Implementation Status* |
|---|---|---|---|
| 1.5 Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. | $48,200 | $27,185 | Director of MTSS working with specialists and parents to support students. |

# LCAP Goal 2 - Actions & Expenditures

| **Action Title**<br>*Copy Action Title from LCAP* | **Budgeted Expenditure**<br>*Copy total Expenditure from LCAP* | **Estimated Actuals (1st Interim)** | **Implementation Note**<br>*Comment on Implementation Status* |
|---|---|---|---|
| 2.1 Ensure that parents understand the ways the school communicates with students' families. | $4,600 | $2,527 | Cost of Parent Square and office staff time. |
| 2.2 Ensure that parents understand the nature of the Montessori method of education. | $4,650 | $1,435 | In-person assemblies and events not feasible at this time. |
| 2.3 Improve parent involvement and volunteerism. | $2,800 | $575 | Volunteer opportunities have been limited due to pandemic. |

# LCAP Goal 2 (cont.) - Actions & Expenditures

| **Action Title**<br>*Copy Action Title from LCAP* | **Budgeted Expenditure**<br>*Copy total Expenditure from LCAP* | **Estimated Actuals (1st Interim)** | **Implementation Note**<br>*Comment on Implementation Status* |
|---|---|---|---|
| 2.4 Increase attendance for all students and decrease chronic absenteeism and suspension rates. | $15,600 | $1,527 | Unable to increase attendance due to COVID outbreaks, did not logically make sense to incentivize regular attendance with PBIS actions during a pandemic. |
| 2.5 Launch Sherwood Montessori Bilingual Scholars program. | $6,000 | $0 | Not a good year to launch brand new initiatives. |

# LCAP Goal 3 - Actions & Expenditures

| **Action Title**<br>*Copy Action Title from LCAP* | **Budgeted Expenditure**<br>*Copy total Expenditure from LCAP* | **Estimated Actuals (1st Interim)** | **Implementation Note**<br>*Comment on Implementation Status* |
|---|---|---|---|
| 3.1 Socioeconomically disadvantaged students will have access to free or reduced lunch. | $1,100 | $800 | This is a regular duty to manage the lunch program use by Sherwood students. |
| 3.2 Socioeconomically disadvantaged students will have access to free after school tutoring. | $12,240 | $6,261 | On target with projections |
| 3.3 Socioeconomically disadvantaged students will have access to free child care before and after school. | $12, 240 | $12,523 | Program has grown now that it is available to all students for free. Additional grant funding covers costs. |

# LCAP Goal 3 - Actions & Expenditures

| **Action Title**<br>*Copy Action Title from LCAP* | **Budgeted Expenditure**<br>*Copy total Expenditure from LCAP* | **Estimated Actuals (1st Interim)** | **Implementation Note**<br>*Comment on Implementation Status* |
|---|---|---|---|
| 4.1 Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | $4,000 | $0 | The big field trip this covers for middle school students doesn't occur until the end of the year. Classrooms have not had many field trips this year. |

Questions?

# Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

| Local Educational Agency (LEA) Name | Contact Name and Title | Email and Phone |
|---|---|---|
| Sherwood Montessori | Michelle Yezbick<br>Director | michelle@sherwoodmontessori.org<br>530-345-6600 |

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2021-22 Local Control and Accountability Plan (LCAP).

Sherwood Montessori has an established foundational principle of meaningful educational partner engagement. These efforts were refinedand improved through the Local Control and Accountability Plan (LCAP) development process. Sherwood will continue to engage community partners regarding the additional Cost-Of-Living-Adjustment (COLA) and 15% increase to concentration funds during the LCAP community partners engagement opportunities in the first half of 2022.

Previous engagement opportunities include:
Town Hall meetings, there have been two conducted this year. Community members, mostly parents and teachers, ask questions and give input about current topics and initiatives during these meetings.
Data is collected from Exit Surveys when families leave the school either for a move out of the area, to go to a non classroom-based program during the pandemic, or to seek a different educational model. These data give school leaders input regarding what was most appreciated and improvement suggestions.
Community Surveys, LCAP Focus Group work, and discussion at open public meetings were used to create the Local Control and Accountability Plan 2021-2022.

Upcoming engagement opportunities for these funds include:

Two more Town Hall meetings will be held.
Exit Surveys will continue to be offered when families leave the school.
The established procedures with Community Surveys, LCAP Focus Group work, and discussion at open public meetings will be used to create the Local Control and Accountability Plan for 2022-2023.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Sherwood will use concentration grant addon funding to provide staff to offer free tutoring and care after school for students.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

Sherwood used a community survey to develop its LCAP and in 2020-2021 use of one-time federal funds for COVID-19 recovery and response. The survey polled all parents, family member, teachers, staff and community members who were asked to evaluate their experiences and give input regarding what they would like to see in terms of school improvement. Student surveys are also given with questions tailored for their experiences.

During the 2020-2021 school year, input was sought for revised questions to capture the experiences of the students and families during distance learning. Focus group members analyzed the data and prepared a presentation for public meetings of the board of directors. A draft of the plan was vetted at the public meetings and the final plan is posted on the school's website.

Recruitment for the LCAP Focus Group was published in the school announcements dated March 4, March 11, March 25, April 1, and April 8, 2021. Announcements are received by all parents, staff, and teachers as well as interested community members, in email or text or both according to subscriber’s choice.

The teachers' meetings on March 9th, April 8th, and May 13th had items relating to the LCAP, including invitation to join the LCAP Focus Group, presentation of Student Surveys, and evaluation of implementation of State Standards. Teachers also had weekly or biweekly meetings with the School Director throughout the school year in which input could be given on a 1:1 basis. The Sherwood Community Survey was sent out on March 29, 2021 and was available through April 25, 2021. Invitations and reminders to complete the survey were included in the school announcements on March 29, April 1, April 8, April 15 and April 22. Paper flyers were handed out to parents by the school’s administrative assistant to parents at pick up time on last day of school before the survey would close on April 25. 62 Sherwood community members (parents, teachers, staff, family members, community members) responded to the survey, the largest number of responses the school has received on such a survey. Student surveys were also filled by Sherwood's students.

The LCAP Focus Group met on April 29, 2021 and on May 10, 2021 and looked at progress made on LCAP goals as measured by the data collected. Actions and goals were examined in light of the data and decisions regarding changes to present in the draft of the LCAP at the May meeting of the Board of Directors in 2021. At the May meeting, the draft was presented and feedback was considered for the final draft which was adopted at the Regular June meeting on June 17, 2021.

This Expenditure Plan for the ESSER III funds was also presented at an open, public meeting of the board of directors with an invitation for attendees to give input on August 19, 2021 and September 16, 2021.

The current year school calendar includes four Town Hall meetings that will be held via Zoom to give stakeholders more opportunities to share their experiences and hopes for the school's programs to address safe in-person instruction and mitigation of learning loss that occurred during school closure.

Sherwood's first Town Hall was held on May 13, 2021 via Zoom to share plans for the 2021-2022 school year and solicit feedback from stakeholders. The meeting was recorded to send to all families as well as corresponding information slide presentations. The Zoom recording and slide presentations were posted on the school's homepage for potential future families to access, as well as any interested community member. This same process was followed during the current school year on September 14, 2021 and November 30, 2021. Next  Town Halls will be February 8, 2022 and April 5, 2022.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

The influx of COVID recovery money has resulted in successes in programming and student and family support. These programs include: Sherwood's Extended Day program, counseling services and mental wellness supports, in-person learning safety procedures, and providing nutritious meals and snacks for students.

Extended Day Program
Successes: Families have access to free before school and after school care with free breakfast, snacks, enrichment activities, and tutoring. Parents and students report high levels of satisfaction with the program and it has grown since it began.
Challenges: Onerous amount of regulation and reporting required to access and track the restrictive funds. There have been fewer than 80 days since the Plan was adopted and the increased amount of time spent in meetings with compliance experts and the school's business manager take away from time that school leadership could be spending more directly impacting teaching and learning.
Lack of a guarantee of long-term support for the programs being implemented. It is difficult to hire and retain staff for programming that may not be feasible with rising costs of pension benefits and revenues tied to average daily attendance in a state with declining enrollment, to name the most concerning.
Absences of teachers, staff, and student due to COVID illness and exposures. Each time a school employee needs to isolate or quarantine, other school employees who are not out need to take time away from their regular duties to cover the duties of the absent staff. The school has continued to recruit and hire substitute employees and we've not had to close any classrooms or the grade levels due to absences, but the disruption has been significant. Student absences disrupt the effectiveness of the learning accelerations strategies as well as the strategies intended to support mental wellness.

Counseling Services and Mental Wellness Supports
Successes: Students who have accessed services have less frequent behaviors that detract from learning.
Challenges: Onerous compliance work, lack of guaranteed long-term support, and absences (described more fully above).

In-Person Learning Safety Procedures

Successes: Rapid antigen testing has been used to find positive cases to prevent outbreaks at school. School has provided masks and UV air purifiers to all classrooms and costs have been completely covered by emergency relief funds.
Challenges: Time spent to learn how to set up a testing clinic, time spent testing and reporting

Providing Nutritious Meals and Snacks for Students
Successes: Students are fed snacks daily that are provided by the school when hungry and can then focus more on learning.
Challenges: Lack of guarantee of long-term financial support for the program. Currently, the school is spending a great deal of money on snacks, but it has been covered by emergency relief funds.

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA's 2021–22 LCAP and Annual Update.

Safe Return to In-Person Instruction and Continuity of Services Plan
ABC Unified School District used its fiscal resources to implement the requirements of the Safe Return to In-Person Instruction and Continuity of Services Plan by....
The implementation of these additional funds received in the 2021-2022 school year are specifically aligned to the LCAP by....
ESSER III Expenditure Plan
ABC Unified School District used its fiscal resources to implement the requirements of the ESSER III Expenditure Plan by....
The implementation of the additional funds received in the 2021-2022 school year are specifically aligned to the LCAP by....

# Instructions for the Supplement to the Annual Update for the 2021–22 Local Control and Accountability Plan Year

*For additional questions or technical assistance related to the completion of the Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan (LCAP), please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.*

## Introduction

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

When reporting available mid-year outcome, expenditure, and implementation data, LEAs have flexibility to provide this information as best suits the local context, provided that it is succinct and contains a level of detail that is meaningful and accessible for the LEA's educational partners.

The 2021–22 Supplement is considered part of the 2022–23 LCAP for the purposes of adoption, review, and approval, and must be included with the LCAP as follows:

- The 2022–23 Budget Overview for Parents
- The 2021–22 Supplement
- The 2022–23 LCAP
- The Action Tables for the 2022–23 LCAP
- The Instructions for the LCAP Template

As such, the 2021–22 Supplement will be submitted for review and approval as part of the LEA's 2022–23 LCAP.

## Instructions

Respond to the following prompts, as required. In responding to these prompts, LEAs must, to the greatest extent practicable, provide succinct responses that contain a level of detail that will be meaningful and accessible for the LEA's educational partners and the broader public and must, to the greatest extent practicable, use language that is understandable and accessible to parents.

In responding to these prompts, the LEA has flexibility to reference information provided in other planning documents. An LEA that chooses to

reference information provided in other planning documents must identify the plan(s) being referenced, where the plan(s) are located (such as a link to a web page), and where in the plan the information being referenced may be found.

**Prompt 1:** "*A description of how and when the LEA engaged, or plans to engage, its* educational partners *on the use of funds provided through the Budget Act of 2021 that were not included in the 2020–21 Local Control and Accountability Plan (LCAP).*"

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

**Prompt 2:** "*A description of how LEA used, or plans to use, the concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.*"

If LEA does not receive a concentration grant or the concentration grant add-on, provide this explanation.

Describe how the LEA is using, or plans to use, the concentration grant add-on funds received consistent with California *Education Code* Section 42238.02, as amended, to increase the number of certificated staff, classified staff, or both, including custodial staff, who provide direct services to students on school campuses with greater than 55 percent unduplicated pupil enrollment, as compared to schools with an enrollment of unduplicated students that is equal to or less than 55 percent.

In the event that the additional concentration grant add-on is not sufficient to increase the number of staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, describe how the LEA is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

**Prompt 3:** "*A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.*"

If the LEA did not receive one-time federal funding to support recovery from the COVID-19 pandemic and the impacts of distance learning on students, provide this explanation.

Describe how and when the LEA engaged its educational partners on the use of one-time federal funds it received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on students. See the COVID-19 Relief Funding Summary Sheet web page (https://www.cde.ca.gov/fg/cr/relieffunds.asp) for a listing of COVID-19 relief funding and the Federal Stimulus Funding web page (https://www.cde.ca.gov/fg/cr/) for additional information on these funds. The LEA is not required to describe engagement that has taken place related to state funds.

**Prompt 4:** "A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation."

If an LEA does not receive ESSER III funding, provide this explanation.

Describe the LEA's implementation of its efforts to maintain the health and safety of students, educators, and other staff and ensure the continuity of services, as required by the federal American Rescue Plan Act of 2021, and its implementation of the federal Elementary and Secondary School Emergency Relief (ESSER) expenditure plan to date, including successes and challenges.

**Prompt 5:** "A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA's 2021–22 LCAP and Annual Update."

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans in a manner that is aligned with the LEA's 2021–22 LCAP. For purposes of responding to this prompt, "applicable plans" include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education
November 2021

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Comprehensive School Safety Plan**

**Date:** February 17, 2022

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**SUMMARY**

California LEAs must review, update and adopt an annual update to the Comprehensive School Safety Plan (CSSP) by March 1st.

**DISCUSSION**

The CSSP presented has the required componenets. Presentation at this public meeting serves to provide an opportunity for stakeholders to give input. Code language shared only with staff has been redacted.

**ACTION REQUESTED**

Adopt plan.

Attachment: 2022-2023 Comprehensive School Safety Plan (code language redacted for public posting)

# Comprehensive School Safety Plan

## 2022-2023
## School Year

**School:** Sherwood Montessori
**CDS Code:** 04614240121475
**District:** Sherwood Montessori
**Address:** 1010 Cleveland Ave.
Chico
**Date of Adoption:**
**Date of Update:** February 17, 2022
**Date of Review:**
- **with Staff**
- **with Law Enforcement**
- **with Fire Authority**

**Approved by:**

| Name | Title | Signature | Date |
|---|---|---|---|
| Russell Shapiro | Chair, Board of Directors | | |
| Robyn Howley | Vice Chair, Board of Directors | | |
| Dan LaBar | Treasurer, Board of Directors | | |
| Beth Hammer | Secretary, Board of Directors | | |
| Karey Cooper | Member, Board of Directors | | |

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## Comprehensive School Safety Plan Purpose

Effective January 1, 2019, Assembly Bill 1747 (Rodriguez), School Safety Plans, became law. This bill requires that during the writing and development of the comprehensive school safety plan (CSSP), the school site council or safety committee consult with a fire department and other first responder entities in addition to currently required entities. It requires the CSSP and any updates made to the plan to be shared with the law enforcement agency, the fire department, and the other first responder entities.

The California Education Code (sections 32280-32288) outlines the requirements of all schools operating any kindergarten and any grades 1 to 12, inclusive, to write and develop a school safety plan relevant to the needs and resources of that particular school.

In 2004, the Legislature and Governor recast and renumbered the Comprehensive School Safety Plan provisions in SB 719 and AB 115. It is the intent ofthe Legislature in enacting the provisions to support California public schools as they develop their mandated comprehensive safety plans that are the result of a systematic planning process, that include strategies aimed at the prevention of, and education about, potential incidents involving crime and violence on school campuses.

The historical requirement of the Comprehensive School Safety Plan was presented in Senate Bill 187, which was approved by the Governor and chaptered in 1997. This legislation contained a sunset clause that stated that this legislation would remain in effect only until January I, 2000. Senate Bill 334 was approved and chaptered in 1999 and perpetuated this legislation under the requirement of the initial legislation.

Comprehensive School Safety Plans are required under SB 719 & AB 115 and contains the following elements:

Assessment of school crime committed on school campuses and at school-related functions

- Child abuse reporting procedures
- Disaster procedures
- Suspension and expulsion policies

- Procedures to notify teachers of dangerous pupils
- Discrimination and harassment policies
- School wide dress code policies
- Procedures for safe ingress and egress
- Policies enacted to maintain a safe and orderly environment
- Rules and procedures on school discipline
- Hate crime reporting procedures

The Comprehensive School Safety Plan will be reviewed and updated by March 1st every year. In July of every year, the school will report on the status of its school safety plan including a description of its key elements in the annual school accountability report card.

A copy of the Comprehensive School Safety Plan is available for review at 1017 E. 16th St., Room 3, Chico, CA 95928.

## Safety Plan Vision

A successfully implemented safety plan will provide the students, staff and families of Sherwood Montessori with a safe and orderly learning environment.

## Components of the Comprehensive School Safety Plan (EC 32281)

**Sherwood Montessori Safety Committee**

Michelle Yezbick, School Director; Beth Hammer, Secretary of Board of Directors

**Assessment of School Safety**

Sherwood has put in place many safety procedures in response to the COVID-19 pandemic, which has been the biggest safety issue in the last year. On-site rapid antigen testing, PPE, consistent hand-washing and face covering, and increased cleaning and sanitation have been implemented to keep the community safe.

**Strategies and Programs to Provide and Maintain a High Level of Safety (EC 32281(a)1, items A-J)**

Comprehensive School Safety Plans are required under SB 719 & AB 115 and contains the following elements:

Assessment of school crime committed on school campuses and at school-related functions

A. Child abuse reporting procedures
B. Disaster procedures
C. Suspension and expulsion policies
D. Procedures to notify teachers of dangerous pupils
E. Discrimination and harassment policies
F. School wide dress code policies
G. Procedures for safe ingress and egress
H. Policies enacted to maintain a safe and orderly environment
I. Rules and procedures on school discipline
J. Hate crime reporting procedures
K. Procedures to Prepare for Active Shooters
L. Procedures for Preventing Acts of Bullying and Cyber-Bullying

The Comprehensive School Safety Plan will be reviewed and updated by March 1st every year.

**(A) Child Abuse Reporting Procedures (EC 35294.2 [a] [2]; PC 11166)**

Any employee who knows or reasonably suspects a child has been the victim of child abuse shall report the instance to a child protective agency. Child abuse is broadly defined as “a physical injury that is inflicted by other than accidental means on a child by another person.” School employees are required to report instances of child abuse when the employee has a “reasonable suspicion”

that child abuse has occurred. Reasonable suspicion arises when the facts surrounding the incident or suspicion could cause another person in the same situation to suspect child abuse.

Child abuse should be reported promptly by phone to a child protective agency. The Chico Children's Protective Services (CPS) 24 hr. hotline number for the Chico area is: 1-800-268-8822 Oroville area: 1-800-400-0902 . The phone call is to be followed by a written report within thirty-six (36) hours.

While there is no legal duty for the reporter to contact the child's parents, reporters are strongly urged to do so if a productive dialogue could be expected to maintain the relationship between the family and the school and to offer support to families in crisis. If a child is released to a peace officer or a child protective agency agent, the reporter shall not notify the parent as required in other instances of removal. Following the report to the proper authorities, employees must notify the School Director regarding any incidents of known or reasonably suspected child abuse.

**(B) Disaster Procedures (EC 35295-35297; GC 8607 and 3100)**

**Disaster Plan (See Appendix C-F)**
Sherwood Montessori will participate in all Chapman Elementary safety drills as they are scheduled by CUSD employees and follow CUSD procedures. The following procedures should be followed unless CUSD procedures are in conflict, in which case CUSD/Chapman procedures will be followed.

Earthquake
1. Warning Signal

2. Procedures
a. If in the classroom, the teacher or person in authority will call "DROP." Students will get under a desk, table, or doorway and assume the duck and cover position and hold on to legs of table.
b. If students are on the playground, they should stay away from buildings and trees, drop, and assume the proper position.
c. Wait for signal to determine if and when to move students.
d. Evacuate to designated areas on the playground.

Tornado
1. Warning Signal

2. Procedures
a. If in the classroom, the teacher or person in authority will call "take cover." Students will get under a desk or table if no interior space (such as a bathroom or closet) is available. They should be as far away from windows and exterior walls as possible. b. If students are on the playground, they should take cover immediately indoors.
c. Wait for signal to determine if and when to move students.
d. Evacuate to designated areas on the playground.

Detailed Earthquake Procedures
1. For earthquakes, the quake itself is the signal to drop and take cover. (Duck-Cover-Hold) Tell students not to try to run during a quake. Broken legs can occur if people run. Students should drop to the ground if they are on the playground. If in the room, they should try to cover themselves in case windows break. Try to drop under a table or desk if possible. Stay down until the shaking subsides.

2. If we are able to announce an all clear signal, teachers are responsible to decide when to take students outside to the assembly area (on playground where we line up for fire drills). Use your best judgment.

3. In a severe quake, students may be injured. Remember that the first step of triage is to instruct all the students to stand up and walk out with you. Those who can't move are your most serious injuries. You may have to leave a student in the room in order to make sure the rest of your group is safe. The sweep and rescue team will take care of the student left behind. This example would not occur except in the most severe kind of earthquake.

4. Always have an up-to-date list of your students in an accessible location. Teachers will need these to make sure all students are accounted for. Teachers will be responsible to take the list when exiting the classroom.

Office Staff

Office Staff will act as coordinators for communication and for the Release Center. At the first sign of an earthquake, all students and staff will drop in the "duck and cover" position until the shaking stops. An all-clear signal will be made verbally by Director through intercom or in person or by messenger. Evacuate at own discretion as necessary.

1. Status check/assess damages in own room - flashlight/batteries.
2. Office Staff set up release area near front of office, depending on damage to building. a. A table and two chairs are needed.
    b. Need cell phone available and walkie talkie.
    c. Emergency forms
    d. Medical lists and medications
    e. Emergency office supply box
    f. Sign out form/release slips
    g. Middle School runners to take release slips to class areas.
3. Director will establish the Release Center near the front of building (by the Sherwood sign)
    a. Cell phone and clipboard
    b. Tables and chairs
    c. Send first aid release forms to first aid station (once you are outside and are able to assess injuries).
5. All support personnel report to the Director at the Release Center after their students are released.
6. The designated staff member will coordinate the Sweep Teams. Check utilities and will only shut off utilities if there are gas or water leaks. Assess damages.
    a. Gas, water heaters, kitchen, check utilities
    b. Electrical
    c. Water
7. First aid team sets up first aid station located by the swings.
8. Sweep Team takes injured to first aid area.
9. Extra staff take positions at front and back gates to direct parents or emergency vehicles.
10. Releasing Students
    a. A designated adult is either recognized or shows identification to the office staff.
    b. The office staff records release of student on form. Designated adult signs.
    c. A release slip for each child will be given to a runner who will go to the appropriate class area to get the child. Parents will only go on the playground for injured students. d. The teacher keeps the release slips.

Sweep Team

Purpose: account for all students and staff, check physical condition of school for unsafe areas.

1. Meet at the Release Center. Sweep team members (3)–assign a runner and two room checkers.
2. Check every room and all bathrooms, multi-purpose room, library, 1010 Cleveland, Learning Center, and the office.
3. Try to open doors, use a crow bar covered with a jacket, etc. to open/break a window if necessary.
4. If all rooms are cleared, check gas lines.

First Aid Team

Location will be near or in the office. Those staff members trained in CPR/First aid will assist those in need. After students are in their areas and accounted for, the team goes to First Aid area.

Teachers and Students

Major responsibility of teachers is for their own students. Teachers are to remain with their students and follow evacuation procedures.

1. At the first sign of an earthquake, all students and staff will drop in the "duck and cover" position until the shaking stops. If we cannot ring an “all clear” bell, classrooms will be notified and the message will be shared via the walkie talkies. If signal is not sounded, classes may evacuate to evacuation area (playground, church side) at teacher discretion.
2. Status check/assess damages in own room - flashlight/batteries.
3. Follow planned escape route or determine safer route and proceed to evacuation area on the playground.
4. Take current class list and first aid kit.
5. Leave immobile students in the classroom with a desk placed over them if possible. Assure child that help is on the way.
6. All rooms will be checked for injuries or fatalities.
7. When in the evacuation area, always take status check on current roll sheet.
8. Students will remain in the designated open areas until their parents come for them, or until instructions are received from authorities in charge.
9. Release child only when release slip is presented. Keep release slips for records. Condition of the child at the time of release will be noted.

Special Teachers

Resource, Speech, Spanish, Drama, Music, A.P.E., Cooking/Gardening, etc. are responsible for any students with them at the time of the emergency. Once in the evacuation area, they release students to their respective teachers. Report to Release Center or sweep team.

COMMUNICATIONS PLAN

1. Telephone/cell phone use will be limited to the Release Center contacting parents/guardians until normalcy is restored to keep communication clear and the focus on stabilizing the situation.
2. Office personnel will use either a battery-operated two-way walkie talkies to communicate with teachers and other school staff.
3. Teachers are responsible for reporting to the Director.
4. Office personnel will notify Fire, Police, and Paramedics if necessary.
5. When calm is restored, and injuries and damages are stabilized, staff members may try to phone family members.

Fire

1. Warning Signal: Series of short bells continue until building is evacuated to the playground.
2. Procedures:
   a. If the smell of smoke or gas is detected, teacher will walk class immediately to designated evacuation area. Be sure doors are closed and lights are turned off.
   b. If there is no smell of smoke or gas, lock the classroom and stay inside as in a lockdown procedure/code red until the all clear signal is given. Please do not use the two-way radio except to respond to the office. The office will contact each classroom if a lockdown is extended and ask for an account of the children.
   c. Children on errands or in rest rooms at the sound of a fire bell should report immediately to the office.
   d. Children with special teachers will remain with that teacher until arriving in the evacuation area. Once inside the evacuation area, special teachers will dismiss students to join the regular classroom teacher. e. Children will wait quietly in evacuation area.
3. Teachers will account for all children using the class register. A green classroom number will be held up if all students are accounted for, a red classroom number will be held up if one or more students are missing. Teachers report to Director if all are present or who is missing.

Lockdown Procedure/ Code Red

The lockdown code is:

All Call (Wireless Intercom System): [redacted]

- If staff hears bullet shots or sees an individual with a weapon or with a threatening demeanor, lockdown procedures should be initiated whether or not an all call is made.

[redacted]

Variations to the lockdown procedure:
1. Classes in progress (not during recess/lunch/PE):
Teacher Response to a Lockdown:

- Lock the classroom door(s) immediately. Your classroom door should already be locked with the lock block on. Lock your door and remain in the room with the students until you hear the code words.

If any other command is given, DO NOT end the lockdown. An intruder may be forcing the office staff to make an announcement. Only the proper code should be followed.

- Keep all students sitting on the floor, away from the door and windows or in a large closet or cabinet if possible, out of sight of the intruder.
- Portable classrooms should form a circular shield of desks/tables/furniture to stop bullets should they pierce the walls.
- Do not unlock your door after the initial sweep to bring kids in. Students should be directed to go to the office if they are locked out in a lockdown. The office is the only door that will open once a lockdown has been initiated.
- Advise students that there is some type of emergency that requires a lockdown, but that you don't know what it is.
- Collect all cell phones and turn them off. This is to prevent the noise and light that will indicate to an intruder where people are hiding. This is also to stop a flow of communication that could cause a panic among parents. If an approved message is sent from the Director or Director's designee, students may text the message verbatim under your supervision.
- Turn your own cell phone ringer off and bring the Catapult app up. Use Catapult to communicate to Sherwood staff members. First communication should be who is missing from the room (Cecile is at the bathroom, Andi is in the Learning Center, etc.).
- Take attendance of your students and prepare a list of missing students and any extra students in your room. Be prepared to take this list with you in case you are directed to leave the classroom.
- Wait until the office asks for your classroom's accounting of students to report missing students.
- Teachers and instructional aides can check the Catapult system for updates, either on personal cell phones or on computers onto which the system has been downloaded.
- Ignore any fire alarm activation–the school will never be evacuated using this method during a lockdown.
- Project a calm attitude to quell student fears.
- Remain in the room until advised in person by office staff or Director that it is safe to end lockdown procedures.
- When or if students are moved from the classroom, assist them in moving as quietly and quickly as possible.
- If an incident is severe in nature, radios may be used to receive further information. Refrain from turning on TV or media when students are present.
- Do not open your door unless you recognize the voice telling you to open the door. We will communicate via the intercoms in your room. Students will be further instructed to enter the nearest classroom if the need to lockdown is urgent.
- Sometimes when the police lockdown an area, it takes a long time for them to clear the area. You may have to be locked down in your room for quite a while. You must stay calm and keep the children calm. Prepare to read books or otherwise keep students busy while they wait.
- Inform students that if they ever hear gunshots while they are outside, they are to lie down on the ground right where they are. The supervision duty person will announce when he or she wants the students to proceed to the nearest room.
- If students are on the way to the bathroom, or to the office, or are otherwise out of the classroom during class time, they must go into the nearest room when they hear the lockdown announcement or when they hear a gunshot.

To students outside at recess/lunch/PE:

- Announce: "Students please line up immediately. Your teacher will be out to pick you up momentarily. Once again, students please stop all activity and line up."
- To call off a lockdown, the code will be announced via the wireless intercom system.

If any other command is given, DO NOT end the lockdown. An intruder may be forcing the office staff to make an announcement. Only the proper code should be followed.

3. During Recess/Lunch/PE: Involving an Armed or Potentially Dangerous Intruder on Campus

[redacted]Principal, playground supervisors, or a designated staff member will contact office immediately with the announcement[redacted]

- Students should be instructed to drop to the playground and cover their heads.
- Students should be instructed to get up and quickly line up when shooting stops.
- The office staff should alert all teachers to lockdown using the appropriate code. A member of the office staff should quickly lock all doors leading outside the building.
- Via 9-1-1, local enforcement will be contacted immediately.
- If possible, a staff member should keep the office informed of the location of the intruder.
- Staff members should use caution when approaching a stranger/intruder on campus.
- Never approach someone with a weapon of any kind.

When approaching an intruder/stranger, staff members should:

- Be courteous and confident
- Keep a distance from the individual
- Not touch the individual
- Protect him/herself at all times
- Encourage students either verbally or with hand signals to keep away from the situation.
- Attempt to be helpful–identify him/herself as someone who can assist the person if necessary.

A staff member should inform the office of any change in status on the playground. The staff member should only use the official lockdown release code to inform the office that the danger is gone. Injuries should be reported to the office immediately.

4. If the Intruder Enters a Classroom or Office:

Procedures where students and staff hide in place are only effective if the intruder is apprehended before students and staff are found.

- In the event that an intruder is able to force his/her way into a classroom, be prepared to fight back.
- Arm students with books, staplers, or other heavy objects to throw at the intruder.
- This procedure SHOULD NOT be practiced with students as it is disturbing, however, could save lives in the event of an actual invasion.

5. If Evacuating the Campus is the Best Option:

Running away from the scene is another potential life-saving procedure that will not be practiced in a drill, but should be used if it is the best possible action to save lives.

[redacted]

- The office staff will bring the Crisis Folder which will have updated student contact information, updated medical conditions, and contact information for people who are authorized to pick up children.
- If we will be dismissing students from the evacuation site, parents MUST communicate with the staff assigned to the Release Center. This will be office staff. NO STUDENTS SHOULD BE RELEASED TO ANYONE, INCLUDING PARENTS, UNTIL OFFICE STAFF HAS RECORDED WHO IS BEING RELEASED TO WHOM IN THIS FOLDER.

6. Medical Emergency During a Lockdown:

Paramedics will not be able to enter a campus that is on lockdown. The procedure if there is a medical emergency is to call 911 and explain to the operator that you are calling from a campus on lockdown and have a
medical emergency. The operator will relay this information to the law enforcement EMS, who will respond to the medical emergency.

[redacted]

Example of 911 call:

[redacted]

Example of Law Enforcement EMS at the door:

[redacted]

**Public Agency Use of School Buildings for Emergency Shelters**
The main campus is the property of Chico Unified School District, therefor the use of school buildings for emergency shelters will be determined by CUSD staff.

**(C) School Suspension, Expulsion and Mandatory Expulsion Guidelines**
PUPIL SUSPENSION AND EXPULSION/DUE PROCESS

This Pupil Suspension and Expulsion Policy has been established in order to promote learning and protect the safety and well-being of all students at Sherwood Montessori. When the Policy is violated, it may be necessary to suspend or expel a student from regular classroom instruction. However, it is the mission of Sherwood Montessori to develop and nurture empathy and social concern in all students and we will strive first to resolve issues with students individually and / or in the classroom setting, where appropriate, prior to resorting to a suspension or expulsion. With the exception of a single act grave in nature, expulsion is an action the Board of Directors will take only after prolonged violations of misconduct when other forms of discipline, including suspension, have not proven successful in assisting the student to correct their behavior or when a student's behavior is continuing to cause a danger to himself or others.

School staff shall enforce disciplinary rules and procedures fairly and consistently amongst all students. This Policy and its Procedures will be printed and distributed as part of the Family Handbook prior to the first day of school and will clearly describe discipline expectations.

Discipline includes, but is not limited to, advising and counseling students, conferring with parents/guardians, suspension, the use of alternative educational environments, and in extreme cases, expulsion.
Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of or willfully causing the infliction of physical pain on a student. For purposes of the Policy, corporal punishment does not include an employee's use of physical intervention that is reasonable and necessary to protect the safety of students, staff or other persons or to prevent damage to school property.
The Board of Directors shall ensure the fair and equitable treatment by ensuring that all students will be afforded their Due Process rights under the law. The Director shall ensure all students and their parents/guardians receive the Family Handbook and are aware of the disciplinary policies.

Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.
A student identified as an individual with disabilities or for whom, Sherwood Montessori has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities in Education Improvement Act (IDEA 2004) or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 (Section 504) is subject to the same grounds for suspension and expulsion and is accorded the same due process procedures applicable to regular education students except when federal and state law mandates additional or different procedures. Sherwood Montessori will follow Section 504 of the Rehabilitation Act, Individuals with Disabilities in Education Improvement Act (IDEA 2004), the Americans with Disabilities Act (ADA) of 1990 and all federal and state laws when imposing any form of discipline on a student identified as an individual with disabilities or for whom Sherwood Montessori has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in accordance with due process to such students.

Grounds for Suspension and Expulsion of Students

A student may be suspended or expelled for prohibited misconduct if the act is related to school activity or school attendance occurring at Sherwood Montessori or at any other school or a school-sponsored event at anytime including but not limited to:
a) while on school grounds;

b) while going to or coming from school;
c) during the lunch period, whether on or off Sherwood Montessori campus;
d) during, going to, or coming from a school-sponsored activity.

Enumerated Offenses

As per established state standards of conduct, students may be suspended or expelled for any of the following acts when it is determined the pupil:

- Caused, attempted to cause, or threatened to cause physical injury to another person or willfully used force of violence upon the person of another, except self-defense.
- Possessed, sold, or otherwise furnished any firearm, knife, explosive, or other dangerous object unless, in the case of possession of any object of this type, the students had obtained written permission to possess the item from a certificated school employee, with the school Director or designee's concurrence.
- Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code 11053-11058, alcoholic beverage, or intoxicant of any kind.
- Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.
- Committed or attempted to commit robbery or extortion.
- Caused or attempted to cause damage to school property or private property.
- Stole or attempted to steal school property or private property.
- Possessed or used tobacco or any products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel.
- Committed an obscene act or engaged in habitual profanity or vulgarity.
- Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code 11014.5.
- Knowingly received stolen school property or private property.
- Possessed an imitation firearm, i.e. a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
- Committed or attempted to commit a sexual assault as defined in Penal Code 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code 243.4.
- Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.
- Made terrorist threats against school officials and / or school property.
- Committed sexual harassment.
- Caused, attempted to cause, threatened to cause, or participated in an act of hate violence.
- Intentionally harassed, threatened or intimidated a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading student rights by creating an intimidating or hostile educational environment.

The above list is not exhaustive and, depending upon the offense, a pupil may be suspended or expelled for misconduct not specified above. Alternatives to suspension or expulsion will first be attempted with students who are truant, tardy, or otherwise absent from assigned school activities. The classroom setting envisioned for Sherwood Montessori requires community acceptance and support and any acts contrary to that aspect of the mission will necessitate intervention on the part of teachers and / or staff.

Suspension Procedure

Suspensions shall be initiated according to the following procedures:

Informal Conference

Suspension shall be preceded, if possible, by an informal conference conducted by the Director or designee with the student and his or her parent and, whenever practicable, the teacher or school employee who referred the student to the Director. The conference

may be omitted if the Director or designee determines that an emergency situation exists. An "emergency situation" involves a clear and present danger to the lives, safety or health of students or school personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student's right to return to school for the purpose of a conference. At the conference, the pupil shall be informed of the reason for the disciplinary action and the evidence against him or her and shall be given the opportunity to present his or her version and evidence in his or her defense.
This conference shall be held within two school days, unless the pupil waives this right or is physically unable to attend for any reason including, but not limited to, incarceration or hospitalization.
No penalties may be imposed on a pupil for failure of the pupil's parent or guardian to attend a conference with school officials. Reinstatement of the suspended pupil shall not be contingent upon attendance by the pupil's parent or guardian at the conference.

Notice to Parents / Guardians
At the time of the suspension, a school employee shall make a reasonable effort to contact the parent / guardian by telephone or in person. Whenever a student is suspended, the parent / guardian shall be notified in writing of the suspension. This notice shall state the specific offense committed by the student. In addition, the notice will also state the date and time when the student may return to school. If school officials wish to ask the parent / guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent / guardian respond to such requests without delay.

Suspension Time Limits / Recommendation for Expulsion
Suspensions, when not including a recommendation for expulsion, shall not exceed five (5) consecutive school days per suspension. Upon a recommendation of expulsion by the Director, the pupil and the pupil's guardian or representative will be invited to a conference to determine if the suspension for the pupil should be extended pending an expulsion hearing. This determination will be made by the Director upon either of the following determinations: 1) the pupil's presence will be disruptive to the education process; or 2) the pupil poses a threat or danger to others. Upon either determination, the pupil's suspension will be extended pending the results of an expulsion hearing.

Authority to Expel
A student may be expelled either by the Sherwood Montessori Board of Directors following a hearing before it or by the Board of Directors upon the recommendation of an ad hoc Disciplinary Panel as needed. The Panel should consist of at least three members, including one teacher from outside the student's classroom and the Director. The Disciplinary Panel may recommend expulsion of any student found to have committed an expellable offense.

Expulsion Procedures
Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the Director or designee determines that the pupil has committed an expellable offense.
The expulsion hearing will be presided over by the Chair of the Board of Directors or the chair of the Disciplinary Panel. In the event a Disciplinary Panel hears the case, it will make a recommendation to the Board of Directors for a final decision whether to expel. The hearing shall be held in closed session unless the pupil makes a written request for a public hearing three (3) days prior to the hearing. Written notice of the hearing shall be forwarded to the student and the student's parent / guardian at least ten (10) calendar days before the dateof the hearing. Upon mailing the notice, it shall be deemed served upon the pupil.

The notice shall include:

- The date and place of the expulsion hearing
- A statement of the specific facts, charges and offenses upon which the proposed is based
- A copy of Sherwood Montessori's disciplinary rules which relate to the alleged violation
- Notification of the student's or parent/guardian's obligation to provide information about the student's status at Sherwood Montessori to any other school district or school to which the student seeks enrollment
- The opportunity for the student or the student's parent/guardian to appear in person or to employ and be represented by counsel or an advocate
- The right to inspect and obtain copies of all documents to be used at the hearing
- The opportunity to confront and question all witnesses who testify at the hearing

- The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses.

Record of Hearing A record of the hearing shall be made and may be maintained by any means, including electronic recording, as long as a reasonably accurate and complete written transcription of the proceedings can be constructed from the electronic version.

Presentation of Evidence
While technical rules of evidence do not apply to expulsion hearings, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs. A recommendation by the Disciplinary Panel to expel must be supported by substantial evidence that the student committed an expellable offense.
Findings of fact shall be based solely on the evidence at the hearing. While hearsay evidence is admissible, no decision to expel shall be based solely on hearsay and sworn declarations may be admitted as testimony from witnesses of whom the Sherwood Montessori Board of Directors, Disciplinary Panel or designee determines that disclosure of their identity or testimony at the hearing may subject them to an unreasonable risk of physical or psychological harm.
If, due to a written request by the expelled pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code §48900, a complaining witness shall have the right to have his or her testimony heard in a session closed to the public. The decision of the Disciplinary Panel shall be in the form of a written recommendation to the Board of Directors who will make a final determination regarding the expulsion.
The final decision by the Board of Directors shall be made within ten (10) school days following the conclusion of the hearing.

Written Notice to Expel
The Director or designee following a decision of the Sherwood Montessori Board of Directors to expel shall send written notice of the decision to expel, including the Board of Directors' findings of fact, to the student or parent / guardian. This notice shall include the following:

- Notice of the specific offense committed by the student
- Notice of the student's or parent / guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with Sherwood Montessori.

The Director or designee shall send written notice of the decision to expel to the student's district of residence, and the Chico Unified School District. This notice shall include the following: a) The student's name and b) The specific expellable offense committed by the student.

Disciplinary Records
Sherwood Montessori shall maintain records of all student suspensions and expulsions. Such records shall be made available to the CUSD upon request.

Expelled Pupils/Alternative Education Pupils who are expelled shall be responsible for seeking alternative education programs including, but not limited to, programs within the County or their school district of residence.

Rehabilitation Plans
Students who are expelled from Sherwood Montessori shall be given a rehabilitation plan upon expulsion as developed by the Board of Directors at the time of the expulsion order, which may include, but is not limited to, periodic review as well as assessment at the time of review for readmission. The rehabilitation plan should include a date not later than one year from the date of expulsion when the pupil may reapply to Sherwood Montessori for readmission.

Readmission
The decision to readmit a pupil or to admit a previously expelled pupil from another school district or charter school shall be the sole discretion of the Board of Directors following a meeting with the Director and the pupil and guardian or representative to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the Sherwood Montessori environment. The Director shall make a recommendation to the Board of Directors following the meeting regarding his or her determination. The pupil's readmission is also contingent upon Sherwood Montessori's capacity at the time the student seeks readmission.

**(D) Procedures to Notify Teachers of Dangerous Pupils (EC 49079)**

Any information that a student may be dangerous will be shared promptly and confidentially with teachers by the School Director or a designee. The notification will be followed up with an email documenting the content of the conversation.

**(E) Sexual Harassment Policies (EC 212.6 [b])**

Sexual Harassment Policy

Sherwood Montessori is committed to providing a cooperative and comfortable work environment free of sexual harassment of any kind. This policy is intended to be consistent with, and intended to be, enforced in conformance with the California Fair Employment and Housing Act as well as Title VII of the Civil Rights Act of 1964, which proscribes harassment in the workplace. The policy of Sherwood Montessori forbids discrimination against any employee, applicant for employment, or student, on the basis of sex. The school will not tolerate sexual harassment activity by any of its employees. This policy similarly applies to non-employee volunteers or any other persons who work subject to the control of school authorities.

A. Definitions

1. Conduct of a Sexual Nature - Conduct of a sexual nature may include, but is not limited to, verbal, visual or physical sexual advances, including subtle pressure for sexual activity; touching, staring, looking up and down, pinching, patting, or brushing against; comments regarding physical or personality characteristics of a sexual nature; sexually-oriented "kidding," "teasing," doubleentendres, explicit or suggestive messages, cartoons, pictures and jokes, and any harassing conduct to which an employee would not be subjected by for such employee's sex.

2. Unwelcome Conduct of a Sexual Nature.

(a) Verbal, visual or physical conduct of a sexual nature may constitute sexual harassment when the allegedly harassed employee has indicated, by his or her conduct, that it is unwelcome;

(b) An employee who has initially welcomed such conduct by active participation must give specific notice to the alleged harasser that such conduct is no longer welcome in order for any such subsequent conduct to be deemed unwelcome;

(c) Sherwood Montessori prohibits any conduct of a sexual nature directed toward students by teachers or others to whom this policy applies, and shall presume that any such conduct is unwelcome.

B. Sexual Harassment Prohibited

1. For the purposes of this policy, unwelcome sexual advances or requests for sexual favors, and other unwelcome conduct of a sexual nature constitute prohibited sexual harassment if:

(a) submission to the conduct is made either an explicit or implicit condition of employment (as an illustration, and not as a limitation, where a person’s continued employment is conditioned upon or impacted by prohibited sexual-based factors);

(b) submission to or rejection of the conduct is used as a basis for an employment decision affecting the harassed employee; and

(c) the conduct substantially interferes with an employee's performance, or creates an intimidating, hostile, or offensive work or school environment, regardless of whether the employee’s continued employment or compensation is affected.

2. Specific Prohibitions.

School Director

(1) It is sexual harassment for the School Director to use his or her authority to solicit sexual favors or attention from subordinates when the subordinate's failure to submit will result in adverse treatment, or when the subordinate's acquiescence will result in preferential treatment.

(2) A School Director who either engages in sexual harassment or tolerates such conduct by other employees shall be subject to sanctions, as described below;

a. Non-managerial and Non-supervisory Employees - It is sexual harassment for a non-administrative and non-supervisory employee to subject another such employee to any unwelcome conduct of a sexual nature. Employees who engage in such conduct shall be subject to sanctions as described below;

b. Employees and Students - It is sexual harassment for an employee to subject a student to any conduct of a sexual nature. Employees who engage in such conduct shall be subject to sanctions as described below.

C. Reporting, Investigation, and Sanctions

1. It is the express policy of Sherwood Montessori to encourage victims of sexual harassment to report such claims. The School understands that victims of harassment are often embarrassed and reluctant to report acts of harassment for fear of being blamed, concern about being retaliated against, or because it is difficult to discuss sexual matters openly with others. However, no employee of the School should have to endure harassing conduct, and therefore the School encourages everyone to promptly report any incidents of harassment so that corrective action can be taken. This may be done through the employee grievance resolution procedure or by reporting such matters to the onsite School Director or to the Board Chair if the grievance is with the School Director.

(a) Employees who feel that their superiors are conditioning promotions, increases in wages, continuation of employment, or other terms or conditions of employment upon agreement to unwelcome conduct of a sexual nature, are encouraged to report these conditions to the appropriate administrator. If the employee's direct administrator or supervisor is the offending person, the report shall be made to the next higher level of authority, up to and including the Board of Directors;

(b) Employees are also urged to report any unwelcome conduct of a sexual nature by superiors or fellow employees if such conduct interferes with the individual's work performance, or creates a hostile or offensive working environment. Every reported complaint of harassment will be investigated promptly and thoroughly by School staff. Typically the investigation will include interviewing the complainant, anyone who may have knowledge of the alleged harassment, and the alleged harasser. Once the investigation is completed, the School will notify the complainant of the results of the investigation. The School will make every effort to handle the investigation in as confidential a manner as possible consistent with a thorough, fair and proper investigation. It should be understood that the School will not tolerate reprisals or retaliation against anyone as a result of the good-faith reporting of charges of sexual harassment. If you feel you have been subject to retaliation in any form, you should report it to your supervisor or the appropriate school administrator;

(c) Students are urged to report any conduct of a sexual nature by school employees or others to whom this policy applies to the School Director or the Board Chair if the problematic conduct is initiated by the School Director.

2. In determining whether alleged conduct constitutes sexual harassment, the totality of the circumstances, the nature of the conduct, and the context in which the alleged conduct occurred have to be investigated. Sherwood Montessori has a responsibility to investigate and resolve complaints of sexual harassment.

3. Any employee found to have engaged in sexual harassment shall be subject to sanctions, including, but not limited to, warning or reprimand, suspension, or termination, subject to applicable procedural requirements. Conduct of a sexual nature directed toward students shall be reported as child abuse for investigation by appropriate authorities.

Filing Complaints with State and Federal Agencies

In addition to notifying the School of harassment or retaliation, aggrieved parties may wish to file complaints with other appropriate state and federal agencies including the Department of Fair Employment and Housing (DFEH), which has authority to conduct investigations of facts. The deadline for filing complaints with the DFEH is two years from the date of the alleged unlawful conduct. If the DFEH believes that a complaint is valid and settlement efforts fail, the DFEH may seek an administrative hearing before the California Fair Employment and Housing Commission or file a lawsuit in court. Both the California Fair Employment and Housing Commission (FEHC) and the courts have the authority to award monetary and non-monetary relief in meritorious cases. Employees can contact the nearest DFEH office or the FEHC at the locations listed in the School's DFEH poster or by checking the state government listings in the local telephone directory.

**(F) School-wide Dress Code Relating to Gang-Related Apparel (EC 35183)**

It is recommended that children wear comfortable and washable clothing that will enable them to participate freely in the many activities of the day. Children in the elementary and middle school levels should wear comfortable athletic shoes on their Physical Education class day/s, no boots or sandals. To prevent loss, jackets and sweatshirts should be labeled with the child's name. There is a Lost and Found shelf near the front office; parents are advised to check there routinely for their child's belongings. Smaller lost and found items are in the office, Room 3. Items in the Lost and Found will be sent to a charitable agency at Thanksgiving Break, Spring

Break, and Summer Break. Prior to these donations, lost and found items will be displayed for parents to peruse at arrival and dismissal times.

**(G) Procedure for Safe Ingress and Egress of Pupils, Parents, and Staff to and from School (EC 35294.2)**

Arrival

Between 8:30 a.m. and 8:45 a.m., Sherwood Montessori staff is available to monitor students as they arrive. This will be on the playground nearest Room 9, the Learning Center, on the east side of campus. Any child on campus before 8:30 a.m. must check in to Extended Day. Extended Day is an optional program and students must be registered prior to attending.

Children arriving after 8:45 a.m. are tardy and must be signed in at the front office, Room 3.

Dismissal/ Pick Up Procedures

- 2:50 is the regular pick-up time for all students in grades TK-3 every day. 2:55 is the regular pick-up time for students in grades 4-8.
- For students in grades TK-3, we ask that parents pick kids up at the classrooms.
- Students in grades 4-8 are dismissed to walk home, ride bikes home, or walk if parents have signed a permission form. Students in grades 4-8 may walk out to their rides or wait for a pick up at the picnic tables near the garden.
- At 2:55, all students in all grades who have not been picked up will be checked in to Extended Day and supervised by after school care staff.
- Students who do not have an Extended Day contract and are on campus before or after school will be sent to the office and a call home will be made.

These procedures ensure that all students are under the supervision of an adult, either a parent or child care staff, at all times while on Sherwood's campus.

**(H) A Safe and Orderly School Environment Conducive to Learning (EC 35294.2)**

**Component:**
COMPONENT 1: Safe and Secure Learning Environment

| Objectives | Action Steps | Resources | Lead Person | Evaluation |
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| Objective 1: Students and staff are trained in a variety of relevant emergencies, and will respond appropriately to them. Staff will communicate to parents/guardians procedures should a disaster occur.<br><br>. | Related Activities:<br>1) Annually review/revise Sherwood's Disaster Preparedness /Emergency Plan, replenish emergency supplies.<br>2) Practice drill procedures with students(eg. fire, tornado, earthquake) | Resources Needed:<br>1) Time to identify, develop and publicize and practice procedures.<br>2) Seek resources (ie. other Disaster Preparedness handbook) that assist with the continuing development of these procedures.<br>3) Inform parents/guardians, in Family Handbook, regarding procedures should a disaster occur.<br>4) Place emergency/disaster information on the school website | Persons Responsible: Director, staff, School Safety Committee | Timeline: Update annually by March 1. |
| Objective 2: Maintain staff CPR/First Aid training and certification. | Related Activities:<br>1) Practice CPR procedures.<br>2) Schedule a first aid class for the staff as needed. | Resources Needed: Funds for CPR/First Aid training/retraining | Persons Responsible: Director | Timeline: Review needs/budget annually. |

COMPONENT 2: School's Social Environment

| Objectives | Action Steps | Resources | Lead Person | Evaluation |
|---|---|---|---|---|
| Objective 1: Maintain written procedures to inform students and parents of acceptable pick-up and drop-off times to prevent unsupervised children and unsafe behavior. | Related Activities: 1) Publicize the acceptable pick-up and drop-off procedures and through Family Handbook, school announcements, letters/emails to parents from teachers/director, and posting signs. 2) Provide kindergarten through third grade children with supervised staff pick up. | Resources Needed: Director will publish the Family Handbook annually. | Persons Responsible: Director, SMPO and Safety Committee. | Timeline: Publish procedures for parents annually in time for start of school in August. |
| Objective 2: Provide ongoing training for the morning and noontime aides in order to develop more effective playground supervisory practices before, during, and after school hours. | Related Activities: 1) Provide conflict resolution techniques training and effective monitoring methods. 2) Build in student awareness of aides' authority and their roles. | Resources Needed: Funding source(s) and training time for noon duty supervision staff in conflict resolution techniques and effective monitoring techniques. Persons Needed: Director, classroom teachers, playground supervisors, Classified Staff Lead. | Persons Responsible: Director, Classified Staff Lead | Timeline: Review training procedures annually. |

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| Objective 3: Publicize the school's discipline policy in August via the Family Handbook and PBIS Handbook posting on the school website and as needed (revisit in School Announcements if emphasis is needed) throughout the school year. | Related Activities: 1) Reinforce discipline policy at Back-to-School Night, in parent conferences as needed, and in the Family Handbook.<br>2) Include traditional Montessori Grace & Courtesy lessons in curriculum.<br>3) Positive Behavior Intervention and Support (PBIS) Handbook published for all employees and community members and reviewed with all employees. | Resources Needed: Time to review, update and publish "School Discipline Policy" in parent handbook. | Persons Responsible: Director, Staff, Safety Committee | Timeline: Prepare, update and publish student discipline policy in Family Handbook annually. |
| **Objectives** | **Action Steps** | **Resources** | **Lead Person** | **Evaluation** |
| Objective 4: Maintain a school climate where each student and staff member is secure from physical and verbal abuse and is responsible for safe play at all times. | Related Activities: 1) Reinforce school playground rules, develop classroom discussions around bullying, breakdown "code of silence" behavior where students are passive bystanders to bullying, address same playground issues with parents and staff in appropriate setting, publicize safety expectations in Family Handbook.<br>2) Build-in process to empower students to take responsibility for their own behavior. 3) Train all staff on maintaining school policies to discussing student behavior issues with parents and Director. | Resources Needed: Resources from Second Step and Steps to Respect curricula on "Bullying" as professional development topic (e.g. school counselor, literature). PBIS Handbook and training. | Persons Responsible: Director, Safety Committee | Timeline: Evaluate all programs annually. |

**Component:**
COMPONENT 3: School Discipline

| Objectives | Action Steps | Resources | Lead Person | Evaluation |
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| Objective 3: Publicize the school's discipline policy in August via the Family Handbook and PBIS Handbook posting on the school website and as needed (revisit in School Announcements if emphasis is needed) throughout the school year. | Related Activities: 1) Reinforce discipline policy at Back-to-School Night, in parent conferences as needed, and in the Family Handbook.<br>2) Include traditional Montessori Grace & Courtesy lessons in curriculum.<br>3) Positive Behavior Intervention and Support (PBIS) Handbook published for all employees and community members and reviewed with all employees. | Resources Needed: Time to review, update and publish "School Discipline Policy" in parent handbook. | Persons Responsible: Director, Staff, Safety Committee | Timeline: Prepare, update and publish student discipline policy in Family Handbook annually. |

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| Objective 4: Maintain a school climate where each student and staff member is secure from physical and verbal abuse and is responsible for safe play at all times. | Related Activities: 1) Reinforce school playground rules, develop classroom discussions around bullying, breakdown "code of silence" behavior where students are passive bystanders to bullying, address same playground issues with parents and staff in appropriate setting, publicize safety expectations in Family Handbook. 2) Build-in process to empower students to take responsibility for their own behavior. 3) Train all staff on maintaining school policies to discussing student behavior issues with parents and Director. | Resources Needed: Resources from Second Step and Steps to Respect curricula on "Bullying" as professional development topic. PBIS Handbook and training. | Persons Responsible: Director, Safety Committee | Timeline: Evaluate all programs annually. |

**(I) School Discipline Rules and Consequences (EC 35291 and EC 35291.5)**

**Sherwood Montessori Student Conduct Code**

Montessori's approach to conduct is one of self-discipline. We understand that students test limits as they grow and they sometimes make mistakes. Our philosophy of discipline is based on using a collaborative problem-solving approach involving the person with the problematic behavior. This includes students, teachers and staff, parents, and any community member involved with Sherwood Montessori. This approach honors the sentiment in our mission statement: providing Montessori education within the context of mutual respect and joy. The focus of the education will be on engaging critical thinking and fostering empathy, and developing the skills needed to become competent, responsible citizens who are life-long learners and skillful problem solvers.

Every student at Sherwood Montessori has a right to learn and thrive in a school atmosphere that is conducive to academic achievement and social growth. Any behavior that threatens to disrupt the learning process or pose a danger to others is unacceptable.

**Conduct Code Procedures**

The Montessori classroom provides a variety of activities from which to choose. Once a child becomes acclimated to the classroom, her or his concentration on the absorbing tasks enable the teacher to maintain a comfortable hum of activity. A combination of group and individual attention is provided. Children are free to move about the environment provided they follow Sherwood's philosophy of mutual respect which includes respect for self, respect for others, and respect for the environment. Occasionally, a child may disrupt the normalized atmosphere; when this occurs, the teacher is responsible for redirecting the child's behavior in a positive manner. If unacceptable behavior continues, the following measures will be taken:

Observe - The teacher will make every attempt to see the situation from the child's point of view. At this point the teacher will ask the child questions to try to resolve the conflict. S/he will always involve the feelings of the child when trying to find a solution.

Discuss - Dr. Montessori believed a child to be capable of reason at an early age. The teacher will attempt to ascertain the cause of the child's acting out. On occasion, a parent may receive an Incident Report, which is intended to keep you apprised of any situations which have occurred. Certain actions, such as willful fighting, will require a parent to be called to come to the school to take the child home for the day. Usually, a conference will follow such measures.

Conference - Continued disruption will require a discussion as to the nature of the misbehavior. Communication between parents, teacher, and child is essential. The aim of these conferences is to suggest the best ways in which to deal with the behavior and gain cooperation from the child. Information shared at these conferences will help to better understand the child's perception. Referral- When parent conferences fail to successfully resolve a situation, we can recommend an appropriate professional on a private basis, or direct you to services offered by our intervention program. These professionals include, but are not limited to, the following: speech therapist, school resource specialist, and school child psychologist.

Dismissal - When all efforts previously stated prove unsuccessful, and we sincerely believe that our program is unable to meet the needs of the child, we may require that a child be dismissed from the school. Please understand that the well-being of your child, as well as his or her classmates, is our primary concern. Every effort possible will be taken to avoid this final measure. Parents have a legal right to appeal a decision to expel a student and details can be read in our Charter.

**(J) Hate Crime Reporting Procedures and Policies**

"Hate crime" means a criminal act committed, in whole or in part, because of one or more of the following actual or perceived characteristics of the victim:

(1) Disability.
(2) Gender.
(3) Nationality.
(4) Race or ethnicity.
(5) Religion.
(6) Sexual orientation.
(7) Association with a person or group with one or more of these actual or perceived characteristics.

Any hate crime committed on school grounds or at a school function must be reported to the Chico Police. Reports will be made for any witnessed or alleged acts that occur between students, staff, parents, or any person whether or not they are associated with the school.

**(K) Procedures to Prepare for Active Shooters**

All Call (Wireless Intercom System [redacted]

- If staff hears bullet shots or sees an individual with a weapon or with a threatening demeanor, lockdown procedures should be initiated whether or not an all call is made.

[redacted]

Variations to the lockdown procedure:

1. Classes in progress (not during recess/lunch/PE):

Teacher Response to a Lockdown:

- Lock the classroom door(s) immediately. Your classroom door should already be locked with the lock block on. Lock your door and remain in the room with the students until you hear the code words.
- If any other command is given, DO NOT end the lockdown. An intruder may be forcing the office staff to make an announcement.
- Keep all students sitting on the floor, away from the door and windows or in a large closet or cabinet if possible, out of sight of the intruder.

- Portable classrooms should form a circular shield of desks/tables/furniture to stop bullets should they pierce the walls.
- Do not unlock your door after the initial sweep to bring kids in. Students should be directed to go to the office if they are locked out in a lockdown. The office is the only door that will open once a lockdown has been initiated.
- Advise students that there is some type of emergency that requires a lockdown, but that you don't know what it is.
- Collect all cell phones and turn them off. This is to prevent the noise and light that will indicate to an intruder where people are hiding. This is also to stop a flow of communication that could cause a panic among parents. If an approved message is sent from the Director or Director's designee, students may text the message verbatim under your supervision.
- Turn your own cell phone ringer off and bring the Catapult app up. Use Catapult to communicate to Sherwood staff members. First communication should be who is missing from the room (Cecile is at the bathroom, Andi is in the Learning Center, etc.).
- Take attendance of your students and prepare a list of missing students and any extra students in your room. Be prepared to take this list with you in case you are directed to leave the classroom.
- Wait until the office asks for your classroom's accounting of students to report missing students.
- Teachers and instructional aides can check the Catapult system for updates, either on personal cell phones or on computers onto which the system has been downloaded.
- Ignore any fire alarm activation–the school will never be evacuated using this method during a lockdown.
- Project a calm attitude to quell student fears.
- Remain in the room until advised in person by office staff or Director that it is safe to end lockdown procedures.
- When or if students are moved from the classroom, assist them in moving as quietly and quickly as possible.
- If an incident is severe in nature, radios may be used to receive further information. Refrain from turning on TV or media when students are present.
- Do not open your door unless you recognize the voice telling you to open the door. We will communicate via the intercoms in your room. Students will be further instructed to enter the nearest classroom if the need to lockdown is urgent.
- Sometimes when the police lockdown an area, it takes a long time for them to clear the area. You may have to be locked down in your room for quite a while. You must stay calm and keep the children calm. Prepare to read books or otherwise keep students busy while they wait.
- Inform students that if they ever hear gunshots while they are outside, they are to lie down on the ground right where they are. The supervision duty person will announce when he or she wants the students to proceed to the nearest room. If students are on the way to the bathroom, or to the office, or are otherwise out of the classroom during class time, they must go into the nearest room when they hear the lockdown announcement or when they hear a gunshot.

2. To students outside at recess/lunch/PE:
   - Announce: "Students please line up immediately. Your teacher will be out to pick you up momentarily. Once again, students please stop all activity and line up."
   - To call off a lockdown, the code will be announced via the wireless intercom system.
   - If any other command is given, DO NOT end the lockdown. An intruder may be forcing the office staff to make an announcement. Only the proper code should be followed.

3. During Recess/Lunch/PE: Involving an Armed or Potentially Dangerous Intruder on Campus
   [redacted]Principal, playground supervisors, or a designated staff member will contact office immediately with the announcement[redacted]
   - Students should be instructed to drop to the playground and cover their heads.
   - Students should be instructed to get up and quickly line up when shooting stops.
   - The office staff should alert all teachers to lockdown using the appropriate code. A member of the office staff should quickly lock all doors leading outside the building.
   - Via 9-1-1, local enforcement will be contacted immediately.
   - If possible, a staff member should keep the office informed of the location of the intruder.
   - Staff members should use caution when approaching a stranger/intruder on campus.
   - Never approach someone with a weapon of any kind.

When approaching an intruder/stranger, staff members should:
- Be courteous and confident
- Keep a distance from the individual
- Not touch the individual

- Protect him/herself at all times
- Encourage students either verbally or with hand signals to keep away from the situation.
- Attempt to be helpful–identify him/herself as someone who can assist the person if necessary.

A staff member should inform the office of any change in status on the playground. The staff member should only use the official lockdown release code to inform the office that the danger is gone. Injuries should be reported to the office immediately.

4. If the Intruder Enters a Classroom or Office: Procedures where students and staff hide in place are only effective if the intruder is apprehended before students and staff are found.
   - In the event that an intruder is able to force his/her way into a classroom, be prepared to fight back.
   - Arm students with books, staplers, or other heavy objects to throw at the intruder.
   - This procedure SHOULD NOT be practiced with students as it is disturbing, however, could save lives in the event of an actual invasion.

5. If Evacuating the Campus is the Best Option: Running away from the scene is another potential life-saving procedure that will not be practiced in a drill but should be used if it is the best possible action to save lives.
   - [redacted]
   - The office staff will bring the Crisis Folder which will have updated student contact information, updated medical conditions, and contact information for people who are authorized to pick up children.
   - If we will be dismissing students from the evacuation site, parents MUST communicate with the staff assigned to the Release Center. This will be office staff. NO STUDENTS SHOULD BE RELEASED TO ANYONE, INCLUDING PARENTS, UNTIL OFFICE STAFF HAS RECORDED WHO IS BEING RELEASED TO WHOM IN THIS FOLDER.

6. Medical Emergency During a Lockdown:
Paramedics will not be able to enter a campus that is on lockdown. The procedure if there is a medical emergency is to call 911 and explain to the operator that you are calling from a campus on lockdown and have a medical emergency. The operator will relay this information to the law enforcement EMS, who will respond to the medical emergency. You will need to tell the 911 operator to ask the law enforcement EMS to use your name, from Sherwood, and refer to the specific emergency. The law enforcement EMS will repeat this information at the locked door, which you should then open to access help.

Example of 911 call:
[redacted]

Example of Law Enforcement EMS at the door [redacted]

**(L) Procedures for Preventing Acts of Bullying and Cyber-bullying**
Bullying may be relational and/or physical and demonstrates an observable pattern of behaviors. Bullying will under no circumstances be tolerated by any person, adult or child, and will be dealt with decisively. Relational bullying can include:

- verbal put downs
- threats of exclusion
- tattling
- boasting and drawing disparaging comparisons
- gossiping
- internet bullying
- threats of physical violence
- threatening non-verbal behaviors such as glaring at someone
- using one's physical size to intimidate

- pushing
- pulling
- pinching
- shoving
- tripping
- any other such means of exerting power and/or intimidation.

Instances of bullying behavior will be dealt with as they happen. Education and support will be provided to all students involved in a short and empathic manner. If additional support is required, the teacher(s), Director, and parent(s)/guardian(s) will develop and implement a plan. However, by responding proactively to these situations, the goal is to prevent unhealthy and conflictual dynamics between teacher, students, and parents.

Students at Sherwood are taught to recognize and stand up to bullying. The acronym "POUR" is used to help students understand the difference between relational conflicts and bullying.
"P" stands for "purposeful". The behavior is on purpose, not impulsive or reactive, or the result of not understanding appropriate social interactions.
"O" is for "one-sided". There is one person who is targeting the other, it is not a back-and-forth in a difficult relationship.
"U" is for "unfair". There is clearly an aggressor and a victim, the bully has the power.
"R" is for repeated, actions and words are recurring.

We empower students to "Give the bully the SLIP", with "SLIP" being another acronym that can help kids remember what to do if they are being bullied.
"S" is for "Stand up, speak up" Kids are encouraged to practice standing still and strong and saying clearly: "Stop!" "L" is for "Label it." Say something like: "That's bullying, it's name-calling, it's a threat, it's leaving someone out." Name the behavior and label it as bullying.
"I" is for "I don't like it."
"P" is for "Please stop." Politely, with power and purpose.

Sherwood students are encouraged to stand up for one another when they notice bullying and use their "bystander power" because bullies are few and bystanders are many. These are just some of the lessons that students are taught in the realm of conflict management and social-emotional learning. Our intention in sharing here in the Family Handbook is to give common language used at school that can be used at home if children report troubling behavior. Having common language will reinforce to kids that caring adults at school and at home will support them in coping with conflict and recognizing when bullying is occurring.

## Safety Plan Review, Evaluation and Amendment Procedures

This Safety Plan will be reviewed, evaluated and adopted annually by March 1st. Input will be sought from staff, local law enforcement and fire authorities. Amendments will be made based on updated guidance.

## Safety Plan AppendicesEmergency Contact Numbers

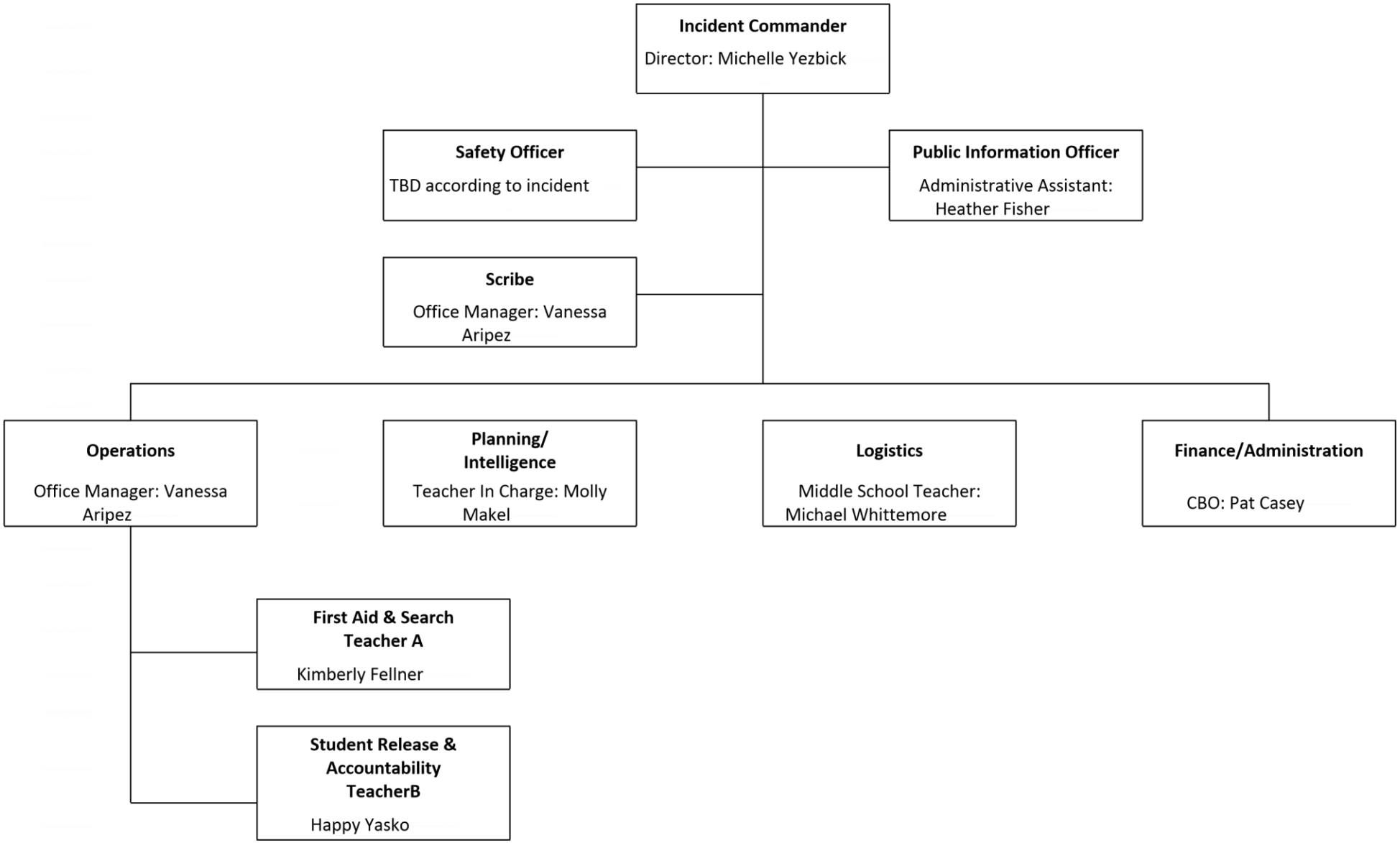
**Utilities, Responders and Communication Resources**

| Type | Vendor | Number | Comments |
|---|---|---|---|
| Law Enforcement/Fire/Paramed ic | Chico Police Department | 530-897-4900 | |
| Law Enforcement/Fire/Paramed ic | Chico Fire Department | 530-897-3400 | |
| Law Enforcement/Fire/Paramed ic | Butte County Department of Public Health | 530-879-3665 | |
| Public Utilities | Water | 530-893-6300 | |
| Public Utilities | Gas & Electric, PG&E | 800-743-5000 | |
| Local Hospitals | Enloe | 530-332-7300 | |
| City Services | Animal Control | 530-897-4960 | |
| School District | Chico Unified School District | 530-891-3000 | |

**Safety Plan Review, Evaluation and Amendment Procedures**

| **Activity Description** (i.e. review steps, meetings conducted, approvals, etc) | **Date and Time** | **Attached Document** (description and location) |
|---|---|---|
| Facilities Inspections | Monthly | Hard copies are stored in school office, summary available in SARC |
| Staff Meetings | Annually | Prior to annual update, teachers are consulted for needed revisions |
| PBIS Team Meetings | Monthly | Meeting notes are stored on school computers |
| Town Hall Meetings | Four times annually | Recordings available on school website |
| Safety Committee Meetings | Annually, prior to updating plan | Notes from meeting are incorporated in updated CSSP. |

**Sherwood Montessori Incident Command System**



**Incident Command Team Responsibilities**

**Standardized Emergency Response Management System Overview**

The California Standardized Emergency Management System (SEMS) is designed to centralize and coordinate emergency response through the use of standardized terminology and processes. This greatly facilitates the flow of information and resources among the agencies participating in response to an emergency. SEMS consists of five functions:

**Management**

During an emergency, the Incident Commander directs response actions from a designated Command Post. To effectively do this, the Incident Commander must constantly assess the situation, and develop and implement appropriate strategies. The Incident Commander must be familiar with the available resources, accurately document all response actions, and effectively communicate response strategies to others participating in the response. This function is typically filled by the school principal. The principal is assisted in carrying out this function by a Public Information & Liaison Officer and Safety Officer.

**Planning & Intelligence**

Planning and Intelligence involves the use of various methods to efficiently gather information, weigh and document the information for significance, and actively assess the status of the emergency. This understanding and knowledge about the situation at hand is vital to the effective management of a response. These activities are performed by a single person who reports directly to the Incident Commander.

**Operations**

All response actions are implemented under by Operations. This includes staff performing first aid, crisis intervention, search and rescue, site security, damage assessment, evacuations, and the release of students.

**Logistics**

Logistics supports the response by coordinating personnel; assembling and deploying volunteers; providing supplies, equipment, and services; and facilitating communications among emergency responders.

**Finance & Administration**

Finance & Administration involves the purchasing of all necessary materials, tracking financial records, timekeeping for emergency responders, and recovering school records following an emergency. These activities are performed by a single person who reports directly to the Incident Commander.

**Emergency Response Guidelines**

**Step One: Identify the Type of Emergency**

**Step Two: Identify the Level of Emergency**

**Step Three: Determine the Immediate Response Action**

**Step Four: Communicate the Appropriate Response Action**

**Types of Emergencies & Specific Procedures**

**Aircraft Crash**
The school is not located in a flight path. If an aircraft crash occurs that could compromise the safety of the students or staff, school personnel will follow the directions of the Safety Officer heading the incident.

**Animal Disturbance**
If a dangerous animal is observed on campus or in an area near campus, school personnel will contact Chico Animal Control at (530) 897-4960. Students will be asked to stay in their classrooms until the animal is contained.

**Armed Assault on Campus**
If an armed assailant is on campus, lockdown procedures will be followed immediately:

Lockdown Procedure/ Code Red The
lockdown code is either:

- [redacted]All Call (Wireless Intercom System): [redacted]
- If staff hears bullet shots or sees an individual with a weapon or with a threatening demeanor, lockdown procedures should be initiated whether or not an all call is made.
- Once a lockdown is begun, staff in the office will switch the two-way radios between Sherwood and Chapman to channel 1 (it is usually kept on channel 2).

Variations to the lockdown procedure:
1. Classes in progress (not during recess/lunch/PE):
Teacher Response to a Lockdown:

- Lock the classroom door(s) immediately. Your classroom door should already be locked with the lock block on. Lock your door and remain in the room with the students until you hear the code words.

If any other command is given, DO NOT end the lockdown. An intruder may be forcing the office staff to make an announcement. Only the proper code should be followed.

- Keep all students sitting on the floor, away from the door and windows or, if possible, in a large closet or cabinet if possible, out of sight of the intruder.
- Portable classrooms should form a circular shield of desks/tables/furniture to stop bullets should they pierce the walls.
- Do not unlock your door after the initial sweep to bring kids in. Students should be directed to go to the office if they are locked out in a lockdown. The office is the only door that will open once a lockdown has been initiated.
- Advise students that there is some type of emergency that requires a lockdown, but that you don't know what it is.
- Collect all cell phones and turn them off. This is to prevent the noise and light that will indicate to an intruder where people are hiding. This is also to stop a flow of communication that could cause a panic among parents. If an approved message is sent from the Director or Director's designee, students may text the message verbatim under your supervision.
- Turn your own cell phone ringer off and bring the Catapult app up. Use Catapult to communicate to Sherwood staff members. First communication should be who is missing from the room (Cecile is at the bathroom, Andi is in the Learning Center, etc.).
- Take attendance of your students and prepare a list of missing students and any extra students in your room. Be prepared to take this list with you in case you are directed to leave the classroom.
- Wait until the office asks for your classroom's accounting of students to report missing students.
- Teachers and instructional aides can check the Catapult system for updates, either on personal cell phones or on computers onto which the system has been downloaded.
- Ignore any fire alarm activation–the school will never be evacuated using this method during a lockdown.
- Project a calm attitude to quell student fears.
- Remain in the room until advised in person by office staff or Director that it is safe to end lockdown procedures.
- When or if students are moved from the classroom, assist them in moving as quietly and quickly as possible.

- If an incident is severe in nature, radios may be used to receive further information. Refrain from turning on TV or media when students are present.
- Do not open your door unless you recognize the voice telling you to open the door. We will communicate via the intercoms in your room. Students will be further instructed to enter the nearest classroom if the need to lockdown is urgent.
- Sometimes when the police lockdown an area, it takes a long time for them to clear the area. You may have to be locked down in your room for quite a while. You must stay calm and keep the children calm. Prepare to read books or otherwise keep students busy while they wait.
- Inform students that if they ever hear gunshots while they are outside, they are to lie down on the ground right where they are. The supervision duty person will announce when he or she wants the students to proceed to the nearest room. If students are on the way to the bathroom, or to the office, or are otherwise out of the classroom during class time, they must go into the nearest room when they hear the lockdown announcement or when they hear a gunshot.

To students outside at recess/lunch/PE:

- [redacted] Announce: [redacted]
- To call off a lockdown, the code will be announced via the wireless intercom system.

If any other command is given, DO NOT end the lockdown. An intruder may be forcing the office staff to make an announcement. Only the proper code should be followed.

3. During Recess/Lunch/PE:

Involving an Armed or Potentially Dangerous Intruder on Campus

- Principal, playground supervisors, or a designated staff member will contact office immediately with the announcement, “It is necessary to begin a lockdown”.
- Students should be instructed to drop to the playground and cover their heads.
- Students should be instructed to get up and quickly line up when shooting stops.
- The office staff should alert all teachers to lockdown using the appropriate code. A member of the office staff should quickly lock all doors leading outside the building.
- Via 9-1-1, local enforcement will be contacted immediately.
- If possible, a staff member should keep the office informed of the location of the intruder.
- Staff members should use caution when approaching a stranger/intruder on campus.
- Never approach someone with a weapon of any kind.

When approaching an intruder/stranger, staff members should:

- Be courteous and confident
- Keep a distance from the individual
- Not touch the individual
- Protect him/herself at all times
- Encourage students either verbally or with hand signals to keep away from the situation.
- Attempt to be helpful–identify him/herself as someone who can assist the person if necessary.

A staff member should inform the office of any change in status on the playground. The staff member should only use the official lockdown release code to inform the office that the danger is gone. Injuries should be reported to the office immediately.

4. If the Intruder Enters a Classroom or Office:

Procedures where students and staff hide in place are only effective if the intruder is apprehended before students and staff are found.

- In the event that an intruder is able to force his/her way into a classroom, be prepared to fight back.
- Arm students with books, staplers, or other heavy objects to throw at the intruder.
- This procedure SHOULD NOT be practiced with students as it is disturbing, however, could save lives in the event of an actual invasion.

5. If Evacuating the Campus is the Best Option:
Running away from the scene is another potential life-saving procedure that will not be practiced in a drill, but should be used if it is the best possible action to save lives.

- We have identified the tennis courts at 20th Street Park as a place to evacuate in the event that this is the safest option. There is a bathroom and visual cover from the campus.
- The office staff will bring the Crisis Folder which will have updated student contact information, updated medical conditions, and contact information for people who are authorized to pick up children.
- If we will be dismissing students from the evacuation site, parents MUST communicate with the staff assigned to the Release Center. This will be office staff. NO STUDENTS SHOULD BE RELEASED TO ANYONE, INCLUDING PARENTS, UNTIL OFFICE STAFF HAS RECORDED WHO IS BEING RELEASED TO WHOM IN THIS FOLDER.

6. Medical Emergency During a Lockdown:
Paramedics will not be able to enter a campus that is on lockdown. The procedure if there is a medical emergency is to call 911 and explain to the operator that you are calling from a campus on lockdown and have a
medical emergency. The operator will relay this information to the law enforcement EMS, who will respond to the medical emergency.
[redacted]

Example of Law Enforcement EMS at the door:
[redacted]

**Biological or Chemical Release**
If a biological or chemical release is determined to be a risk for the staff or students of Sherwood, all students and personnel will remain indoors with windows and doors shut tightly. Staff will follow roles outlined in the Incident Command System to coordinate with first responders. When it is safe to do so, staff will begin to release students to parents while remaining in Incident Command System roles to keep order and record when and with whom students are released.

**Bomb Threat/ Threat Of violence**
A bomb threat will result in a building evacuation with students and staff proceeding to the far end of the playground field, lining up in fire drill order near the fence. The Chico Police Department will be called at (530) 897-4900 and school staff will follow the instructions of the officer assigned to the incident.

A threat of violence will result in a lockdown procedure and call to the Chico Police Department. Students and staff will remain in lockdown until the incident is determined to be resolved by the Chico Police.

**Bus Disaster**
Sherwood does not have a bus.

**Disorderly Conduct**
Disorderly conduct observed by a stranger outside the school will be reported to the Chico Police Department if the conduct appears to be dangerous. If the individual appears to pose a threat to students or staff on the school site, lockdown procedures may be initiated.

**Earthquake**
Earthquake
1. Warning Signal

2. Procedures

a. If in the classroom, the teacher or person in authority will call "DROP." Students will get under a desk, table, or doorway and assume the duck and cover position and hold on to legs of table.

b. If students are on the playground, they should stay away from buildings and trees, drop, and assume the proper position.

c. Wait for signal to determine if and when to move students.

d. Evacuate to designated areas on the playground.

Detailed Earthquake Procedures

1. For earthquakes, the quake itself is the signal to drop and take cover. (Duck-Cover-Hold) Tell students not to try to run during a quake. Broken legs can occur if people run. Students should drop to the ground if they are on the playground. If in the room, they should try to cover themselves in case windows break. Try to drop under a table or desk if possible. Stay down until the shaking subsides.

2. If we are able to announce an all clear signal, teachers are responsible to decide when to take students outside to the assembly area. Use your best judgment.

3. In a severe quake, students may be injured. Remember that the first step of triage is to instruct all the students to stand up and walk out with you. Those who can't move are your most serious injuries. You may have to leave a student in the room in order to make sure the rest of your group is safe. The sweep and rescue team will take care of the student left behind. This example would not occur except in the most severe kind of earthquake.

4. Always have an up-to-date list of your students in an accessible location. Teachers will need these to make sure all students are accounted for. Teachers will be responsible to take the list when exiting the classroom.

Office Staff

Office Staff will act as coordinators for communication and for the Release Center. At the first sign of an earthquake, all students and staff will drop in the "duck and cover" position until the shaking stops. An all-clear signal will be made verbally by Director through intercom or in person or by messenger. Evacuate at own discretion as necessary.

1. Status check/assess damages in own room - flashlight/batteries.
2. Office Staff set up release area near front of office, depending on damage to building.
    a. A table and two chairs are needed.
    b. Need phone available - cellular phone or walkie talkie.
    c. Emergency forms
    d. Medical lists and medications
    e. Emergency office supply box
    f. Sign out form/release slips
    g. Middle School runners to take release slips to class areas.
3. Director will establish the Release Center near the front of building
    a. Cell phone and clipboard
    b. Tables and chairs
    c. Send first aid release forms to first aid station (once you are outside and are able to assess injuries).
5. All support personnel report to the Director at the Release Center after their students are released.
6. The designated staff member will coordinate the Sweep Teams. Check utilities and will only shut off utilities if there are gas or water leaks. Assess damages.
    a. Gas, water heaters, kitchen, check utilities
    b. Electrical
    c. Water
7. First aid team sets up first aid station located by the swings.
8. Sweep Team takes injured to first aid area.
9. Extra staff take positions at front and back gates to direct parents or emergency vehicles.
10. Releasing Students
    a. A designated adult is either recognized or shows identification to the office staff.

b. The office staff records release of student on form. Designated adult signs.
c. A release slip for each child will be given to a runner who will go to the appropriate class area and get the child. Parents will only go on the playground for injured students. d. The teacher keeps the release slips.

Sweep Team

Purpose: account for all students and staff, check physical condition of school for unsafe areas.

1. Meet at the Release Center. Sweep team members (4)–assign a runner, an entrance "monitor," and two room checkers.
2. Check every room and all bathrooms, multi-purpose room, library, 1010 Cleveland, Learning Center, and the office.
3. Try to open doors, use a crow bar covered with a jacket, etc. to open/break a window if necessary.
4. If all rooms are cleared, check gas lines.

First Aid Team

Location will be near or in the office. Those staff members trained in CPR/First aid will assist those in need. After students are in their areas and accounted for, the team goes to First Aid area.

Teachers and Students

Major responsibility of teachers is for their own students. Teachers are to remain with their students and follow evacuation procedures.

1. At the first sign of an earthquake, all students and staff will drop in the "duck and cover" position until the shaking stops. If we cannot ring an "all clear" bell, classrooms will be notified and the message will be spread room to room via the buddy system. If that is not possible, classes will evacuate to evacuation area (playground, church side) at teacher discretion.
2. Status check/assess damages in own room - flashlight/batteries.
3. Follow planned escape route or determine safer route and proceed to evacuation area on the playground.
4. Take current class list and first aid kit.
5. Leave immobile students in the classroom with a desk placed over them if possible. Assure child that help is on the way.
6. All rooms will be checked for injuries or fatalities.
7. When in the evacuation area, always take status check on current roll sheet.
8. Students will remain in the designated open areas until their parents come for them, or until instructions are received from authorities in charge.
9. Release child only when release slip is presented. Keep release slips for records. Condition of the child at the time of release will be noted.

Special Teachers

Resource, Speech, Spanish, Drama, Music, A.P.E., Cooking/Gardening, etc. are responsible for any students with them at the time of the emergency. Once in the evacuation area, they release students to their respective teachers. Report to Release Center or sweep team.

COMMUNICATIONS PLAN

1. Telephone/cell phone use will be limited to the Release Center until normalcy is restored.
2. Office personnel will use either a battery-operated radio or car radio for outside use.
3. Teachers are responsible for reporting to the Director.
4. Office personnel will notify Fire, Police, and Paramedics if necessary.
5. When calm is restored, and injuries and damages are stabilized, staff members may try to phone family members.

**Explosion or Risk Of Explosion**

Explosion or risk of explosion on campus will result in a building evacuation with students and staff proceeding to the far end of the playground field, lining up in fire drill order near the fence. The Chico Police Department will be called at (530) 897-4900 and school staff will follow the instructions of the officer assigned to the incident.

**Fire in Surrounding Area**

If a fire in the surrounding area is determined to be causing poor air quality but there is no risk of the fire spreading to the school, students and staff will remain indoors with doors and windows shut tightly.

If it is determined that the fire could spread to the school, an evacuation will be conducted with coordination from emergency personnel. The school does not have a bus, so vehicular evacuation will require coordination with first responders. Sherwood's Incident Command System will be implemented to track dismissal of students and recording when and with whom students were released.

**Fire on School Grounds**

Fire

1. Warning Signal: Series of short bells continue until building is evacuated to the playground.
2. Procedures:
    a. If the smell of smoke or gas is detected, teacher will walk class immediately to designated evacuation area. Be sure doors are closed and lights are turned off.
    b. If there is no smell of smoke or gas, lock the classroom and stay inside as in a lockdown procedure/code red until the all clear signal is given [redacted] Please do not use the two-way radio except to respond to the office. The office will contact each classroom if a lockdown is extended and ask for an account of the children.
    c. Children on errands or in rest rooms at the sound of a fire bell should report immediately to the office.
    d. Children with special teachers will remain with that teacher until arriving in the evacuation area. Once inside the evacuation area, special teachers will dismiss students to join the regular classroom teacher. e. Children will wait quietly in evacuation area.
3. Teachers will account for all children using the class register. A green classroom number will be held up if all students are accounted for, a red classroom number will be held up if one or more students are missing. Teachers report to Director if all are present or who is missing.

**Flooding**

Sherwood Montessori is located in an area with minimal flood hazard. If school personnel is notified by emergency personnel that a flood is imminent, school staff will follow the directions of the emergency personnel.

**Loss or Failure Of Utilities**

If there is a loss or failure of utilities such as water or electricity, the appropriate agency will be contacted to determine the duration and area of the outage. The duration and scope of the outage will determine the action of the school. If it is determined that normal school operations can continue because the outage time will be limited, staff will adjust instruction accordingly: e.g.: teachers may lead classes in outdoor activities, portable handwashing stations may be set up and filled with transported water, battery powered light sources may be used.

A longer outage will require interagency communication and cooperation to determine if generators can be safely used on campus, for example, or if temporary bathroom facilities should be brought to campus.

**Pandemic**

OVERVIEW

An infectious disease is an illness caused by the presence of disease-causing agents or germs, including viruses, bacteria, fungi and parasites and other microbes. These diseases are called communicable diseases or transmissible diseases due to their potential of transmission from one person to another.

Transmission may occur by direct contact with an infected person or animal, by ingesting contaminated food or water, or by contact with infected surroundings or contaminated air. Infectious (communicable) diseases that usually require a more specialized route of infection—for example, by insects such as mosquitoes or ticks (disease vectors) —are usually not regarded as contagious. Contagious diseases acquired by blood or needle transmission or sexual contact require prophylactic strategies but not measures such as social distancing or quarantine. Strict measures as addressed in annual Blood Borne Pathogen training are a prevention strategy in place in the school system.

At-Risk Populations

Students are a high- risk population for infectious disease, and exposure to a variety of infectious diseases in a school population is inevitable. Infectious diseases are common in young children who have immature immune systems and are developmentally unable to understand and practice the concepts of good personal hygiene. However, older youth and teenagers exposed to different social situations are also prone to certain infections. In any school population, there are certain individuals who may have a higher risk of complications if exposed to specific diseases. Students and staff who are medically fragile or are immunosuppressed, pregnant, and/or have chronic disease, nutritional deficiencies or debilitating illness should be informed of the possible risks of acquiring an infection.

The responsibility of the school is to inform those individuals to consult with their licensed health care provider. The licensed health care provider will assess the risk, provide appropriate treatment and/or make recommendations so that reasonable accommodations are put in place for the individual by the school.

PURPOSE OF THE PLAN

The purpose of this plan is to provide a comprehensive guide on how an infectious disease outbreak might affect school-aged children, how to respond, and how local agencies should plan ahead.

During an infectious disease outbreak, Sherwood will utilize this Emergency Plan to achieve the following goals:

- Limit the number of illnesses and deaths
- Preserve continuity of essential school functions
- Minimize educational and social disruption
- Minimize economic and academic losses A designated lead agency, generally the Butte County Department of Public Health, will coordinate with other local response and support agencies teams to incorporate all-hazard response activities and plans of our community, state and federal partners.

This plan does not address:

- Symptoms of specific infectious diseases, diagnosis, epidemiology, treatment, prognosis, and follow- up.
- Nuisance diseases such as lice that do not pose a significant threat to the health of the community. Such diseases, however, may cause considerable anguish and disruption to schools. Therefore, close cooperation between school administrators and local Public Health is essential for effective control of “nuisance” diseases in schools.
- Health plans, exams, medications, insurance, testing and assessment.

Planning Assumptions

1. The Butte County Public Health Department has the legal authority and primary responsibility for investigating the health and contagiousness of local students. These duties include the identification and control of human disease outbreaks and determining response capacity and capabilities.
2. Recognizing that children will more likely shed the greatest amount of virus (they are more contagious than adults), they are therefore likely to pose the greatest risk for transmission.
3. On average, about two secondary infections will occur as a result of transmission from someone who is ill.
4. In a severe outbreak, the school will need to plan to function with a 40%-60% work force absentee rate.
5. Whether or not schools will be closed or for how long is impossible to say in advance. However, it is well established that infectious disease outbreaks most often start in schools, so school closings may be likely. The duration of school closings can only be determined at the time of the event based on the characteristics of the outbreak, but it is unlikely that schools will be closed for less than 2 weeks (based on the incubation period of the disease and the length of time people are contagious) and could be as long as 12 weeks or longer.
6. Other planning assumptions that are being used by the community include working closely with local health and emergency services agencies will maximize the health and safety of the school community. Understanding the roles of each agency and their responsibilities will promote coordination and communications.

- An infectious disease outbreak may result in the rapid spread of the infection. Communities across the State and the country may be impacted simultaneously.

- There will be a need for heightened local surveillance of disease symptoms and infection rates.

- Antiviral medications may be in extremely short supply. Local supplies of antiviral medications may be prioritized by the local health agency for hospitalized patients, close contacts of patients, health care workers providing care for patients, or other designated groups.

- Social distancing strategies aimed at reducing the spread of infection such as closing schools, community centers, and other public gather points and canceling public events may be implemented.

- It will be especially important to coordinate disease control strategies throughout counties in the local area and the State due to the regional mobility of the population.

- The general public, health care partners, response agencies, elected officials and schools will need continuous updates on the status of the outbreak, the steps local response agencies and the school are taking to address the incident, and steps the public can take to protect themselves.

Legal Issues Relating to Schools

1. Public Health Responsibilities
   a. The Butte County Public Health officer may order schools to close. (Health & Safety §120175).
   b. Written permission of the Public Health Officer or private physician may be required before an individually-quarantined employee or student is allowed to return to school.

2. School Facilities California Education Code §32282 provides that school facilities are to be made available for mass care and welfare shelters during disasters. As part of its school safety plan, schools are required to establish a procedure to allow a public agency, including the American Red Cross, to use school buildings, grounds and equipment for emergencies involving the public health and welfare. For buildings owned by CUSD and located on a CUSD campus, Sherwood will defer to CUSD's procedures for such emergencies.

3. School Employees as Disaster Workers School employees are disaster workers pursuant to Government Code §3100 and, as such, are "subject to such disaster service activities as may be assigned to them by their superiors or by law."

4. School funding during closure/reduced Average Daily Attendance (ADA) due to infectious disease outbreak a. California Education Code §46392 allows crediting for ADA in the case of an epidemic that reduces school enrollment.
b. California Education Code §41422 allows crediting for full apportionment if a school is prevented from operating schools for at least 175 days due to epidemic or order from government official due to emergency.

5. Students a. Quarantine under direction of County Public Health officer is an excused absence. (California Education Code §48205).

Concept of Operations

The Butte County Department of Health and Human Services will be the lead agency in coordinating the local health and medical response to an epidemic or pandemic with state, federal, and local agencies and officials.

The school will maintain increased communications with Butte County Department of Health and Human Services, which will then provide information to the County Operational Area Emergency Operations Center (EOC) to implement those procedures that increase the health and safety of the school community.

The school assumes the following responsibilities:

- Develop capabilities to implement non-medical measures to decrease the spread of disease throughout the school community as guided by the epidemiology of the pandemic and the Butte County Health Department.

• Develop and implement pandemic preparedness activities and a business continuity plan aimed at maintaining the provision of educational services and limiting the spread of disease throughout the duration of the pandemic outbreak.
• Review sick leave policies and make adjustments as necessary to ensure non-punitive policies are in place.
- Review policies regarding quarantines and pay continuation and make adjustments as necessary.

• Communicate with and educate the school community and parents about approved public health practices and what each person can do to prepare or respond to minimize health risks.
• Develop and implement educational support plans for students who are isolated or quarantined and coordinate these plans with the social support plans developed by the Butte County Health Department and the California Department of Education.
- Develop a recovery plan that provides for education support and emotional support for staff and students.
- Review best practices for respiratory hygiene and universal precautions and train all school staff, volunteers and students.
- Identify and procure needed resources.
- Review procedures for sending ill individuals home and make adjustments, if necessary.
- Establish and implement surveillance process to report the number of absent staff and students due to communicable diseases. Many communicable diseases are required by California state law to be reported to the County Department of Health. Appendix B provides the Title 17, California Code of Regulations §2500, §2593, §2641.5-2643.20 and §28002812 Reportable Diseases and Conditions and a sample School Weekly Report of Communicable Diseases.
- Update staff and provide information on extent of infection at school site and potential changes that might take place at school.
- Document all actions taken.

MITIGATION AND PREVENTION

Mitigation activities are taken in advance of an infectious disease outbreak to prevent or temper its impact. Mitigation efforts will occur primarily during the early phase of the outbreak.

How Illness Spreads
Transmission of an infectious disease may occur through several pathways:

1. Direct Contact. Direct-contact involves skin-to-skin contact and physical transfer of microorganisms from an infected person to a susceptible host.

   a. Person to person: The most common way for infectious disease to spread is through the physical direct transfer of bacteria, viruses or other microorganisms from one person to another. These germs can be spread when an infected individual touches, coughs on or kisses someone who is not infected, through the exchange of body fluids from sexual contact or a blood transfusion. Mononucleosis can be spread by saliva. Diseases such as Hepatitis B, Hepatitis C, and the human immunodeficiency virus (HIV) can be spread by contact with infected blood. Infected students can possibly transmit these diseases through biting if there is visible blood mixed with their saliva (i.e. from bleeding gums).

   b. Animal to person: A scratch or bite from infected animal or handling animal droppings can cause disease.

2. Indirect Contact. Many microorganisms can linger on objects such as a doorknobs, faucet handles, desktops and computer keypads. Indirect contact involves contact of a susceptible host with a contaminated intermediate object in the environment. Some infections can be spread indirectly by contact with contaminated clothing. Chickenpox (varicella), shingles (herpes zoster), impetigo, head lice, ringworm, and scabies are all spread this way.

3. Vector. Vector-borne diseases rely upon organisms, usually insects, for transmission of the parasitic, viral or bacterial pathogens from one host to another. Bites and stings from mosquitoes, fleas, ticks and lice carry disease-causing microorganisms on their body or in their intestinal tract which can infect humans.

4. Droplets. Disease is easily spread when droplets containing pathogenic microorganisms are generated from an infected person during sneezing, coughing or talking. Large droplets travel less than three feet before falling to the ground and do not remain

suspended in the air. Transmission via large-particle droplets requires close contact between the infected host and another person. Sick students will often contaminate their hands and other objects with infectious nose and throat discharges. When other students come in contact with these objects and then touch their eyes, mouth, or nose, they can become infected. Some of the infections passed in this way are the common cold, chickenpox, influenza, meningitis (viral and bacterial), mumps, rubella, pink eye (conjunctivitis), strep throat, and whooping cough (pertussis).

5. Airborne. Airborne transmission occurs when an infected person coughs, sneezes or talks and generates very small respiratory droplets containing virus or bacteria. These small particles remain suspended in the air for long periods and can be widely dispersed by air currents. When another person inhales these small particles, they can become ill. Airborne transmission of disease can also occur through inhalation of small-particle aerosols in shared air spaces with poor circulation.

6. Foodborne. Consumption of food and liquids contaminated with pathogenic bacteria can result in illness or death. 7. Fecal. Intestinal tract infections are often spread through oral ingestion of viruses, bacteria, or parasites found in the stool of an infected person or animal. This type of transmission happens when objects contaminated with microscopic amounts of human or animal feces are placed in the mouth. In schools, the areas most frequently contaminated with feces are hands, classroom floors, faucet handles, toilet flush handles, toys and tabletops.

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Prevention Strategies

CLEANING. A virus generally lives 2 to 8 hours on surfaces, but certain viruses may live up to a week or longer. Friction is a key element in cleaning by using soap (or detergent) and water to physically remove germs, dirt, and impurities from surfaces or objects. Cleaning does not necessarily kill germs, but lowers their numbers and mitigates the necessary host environment for pathogen survival, concurrently reducing the risk of spreading infection.

DISINFECTING. Disinfection is the destruction of pathogenic or other harmful microorganisms by use of chemicals on surfaces or objects. Disinfecting does not necessarily clean dirty surfaces or remove germs. Disinfecting agents specifically target infectious pathogens and can lower the risk of spreading infection by killing germs on a surface after it has been cleaned. Disinfection is generally intended for patient-care items in health care facilities. Disinfection requires contact between the disinfectant and the surface to be disinfected for at least ten minutes under moist conditions.

SANITIZING. Sanitizing reduces the number of microbial contaminants on surfaces or objects to a relatively safe level, as judged by public health standards or requirements. Sanitizing works by either cleaning or disinfecting surfaces or objects to lower the risk of spreading infection.

a. Routine Cleaning and Disinfecting. It is important to match cleaning and disinfecting activities to the types of microorganisms to be removed.
Flu viruses are relatively fragile and can live and potentially infect a person for only 2 to 8 hours after being deposited on a surface, so standard cleaning and disinfecting practices are sufficient to remove or kill them. It is not necessary to close schools to clean or disinfect every surface in the building to slow the spread of flu.
Special cleaning and disinfecting processes, including wiping down walls and ceilings, frequently using room air deodorizers, and fumigating, are not necessary or recommended. These processes can irritate eyes, noses, throats, and skin; aggravate asthma; and cause other serious side effects. If surfaces or objects are soiled with body fluids or blood, use gloves and other standard precautions to avoid coming into contact with the fluid. Remove the spill, and then clean and disinfect the surface.

Extra attention should be paid in cleaning the following areas:

- Classrooms with young children. Clean and sanitize toys regularly.
- Common areas. Clean and periodically sanitize desks, tables, countertops and drinking fountains.
- High touch areas. Computer keyboards, doorknobs and handles, visual aids and telephones.

Do not mix cleaners and disinfectants unless the labels indicate it is safe to do so. Combining certain products (such as chlorine bleach and ammonia cleaners) can result in serious injury or death.

b. Handle waste properly. Follow standard procedures for handling waste, which may include wearing gloves. Place no-touch waste baskets where they are easy to use. Throw disposable items used to clean surfaces and items in the trash immediately after use. Avoid

touching used tissues and other waste when emptying waste baskets. Wash your hands with soap and water after emptying waste baskets and touching used tissues and similar waste.

Universal Precautions

Universal precautions are a set of guidelines that assume that all blood and certain other bodily fluids are potentially infectious. Follow universal precautions when providing care to any individual, whether or not the person is known to be infectious.

The list below describes universal precautions:

a. Handwashing

Handwashing is one of the best tools for controlling the spread of infections. All students and staff should perform effective hand washing, which will reduce the amount of illness in schools. Avoid eating or touching mouth or eyes while giving any first aid.

Wash hands thoroughly with warm running water and a mild liquid soap for at least 15 seconds. Scrub between fingers, under fingernails and around the tops and palms of hands:

- Before and after physical contact with any person (even if gloves have been worn)
- After contact with a cleaning agent
- After using the restroom
- After providing first aid
- Before and after eating or handling food
-

b. Personal Protective Equipment (PPE)

- Wear disposable gloves when in contact with blood or any body fluid
- Wear protective eyewear whenever eyes may come in contact with body fluids (e.g.: squirting blood)
- Wipe up any blood or body spills as soon as possible
- Double-bag the gloves/soiled paper towels in plastic bags and dispose of immediately
- Clean the area with an approved disinfectant or bleach solution (bleach: water= 1:10)
- Send all soiled clothing home with the person in a double-bagged plastic bag

Immunizations

Childhood Immunizations

Immunizations help prevent serious illnesses. State health regulations require students attending school to be up-to-date on all immunizations. A waiver signed by a licensed physician is required for a valid medical exemption. Hepatitis A, influenza, and bacterial meningitis vaccines are available but not required for school attendance. Seasonal flu vaccination is strongly recommended for anyone over 6 months of age. California law requires students entering grades 7 through 12 to provide proof of Tdap immunization to enter school. Schools should have documentation of the immunization status of all students on file.

Adult Immunizations

The California Department of Public Health strongly recommends that school personnel be vaccinated against diphtheria, tetanus, mumps, measles, polio, chickenpox (varicella), and rubella (German measles). It is especially important for women of childbearing age to be immune to rubella, as this infection can cause complications for the developing fetus. Seasonal flu vaccination is strongly recommended.

Animals/Pets at School

Animals in the classroom can be beneficial in the education process. However, some animals can transmit infectious diseases to humans. For example, reptiles shed Salmonella bacteria in their feces without being sick themselves. People can contaminate their hands with feces when they handle or clean up after the animal, and disease can spread through the fecal?oral route explained above. Some animals are not appropriate for the classroom, such as: poisonous animals (e.g., poisonous spiders, snakes, and insects); wild, stray, or aggressive animals; or animals from an unknown source. To minimize the risk of students and staff acquiring an infectious disease from animals, take simple precautions:

- Keep animal cages or enclosures clean and in good repair. Students who assist in cleaning the cage(s) should be supervised and should wash their hands afterwards.
- Students and staff should always wash their hands after any contact with animals, and after visiting places with animals such as zoos or farms.
- Students should never “kiss” animals or have them in contact with their faces.

PREPAREDNESS

Effective preparedness includes establishing policies to maintain sanitation, keep records current, conduct periodic inspections and regular maintenance and training for staff.

General Activities

- Plan, exercise, evaluate and revise the Emergency Plan for Infectious Disease;
- Train and equip staff to assure competencies and capacities needed to respond to an infectious disease outbreak;
- Develop strategic partnerships with local community health care institutions and providers, and local, State and federal response agencies and their staff;
- Develop and implement surveillance and reporting procedures to monitor illness patterns in the schools;
- Educate schools and parents about infectious disease and recommend protective measures
- Inform and update schools about the potential impacts of an infectious disease outbreak on essential services and city, county, and school infrastructure;
- Stockpile necessary equipment and supplies that will be needed to respond to a disease outbreak;
- Establish ventilation (HVAC) standards to be used during response and recovery (such as filter change schedules, etc.).

Personal Protective Equipment (PPE)

- Provide PPE to staff (For example, N-95, which must be fit-tested, or surgical masks and nitrile gloves, an alternative to latex gloves).
- Address PPE issues with staff (i.e. uncomfortable, frequent changes, difficulties recognizing coworkers, communication issues, one size does not fit all).
- Ensure that you have adequate stock and an array of sizes and types available.

- Provide and use alcohol-based hand sanitizer and non-aerosol spray disinfectant for commonly touched surfaces.
- Train all staff to use PPE, including administrators, maintenance and security staff.
- Encourage staff to talk about the PPE issues and to develop a "we will get through this" mentality.

Training

- Require new staff, including substitutes and volunteers, to complete First Aid and CPR training, including child CPR;
- Provide refresher awareness training for all staff;
- Train staff to use chemicals properly to prevent accidental contamination and human xposure;
- Provide training on identifying symptoms of infectious disease;
- Educate school staff on the process and importance of routine hand hygiene and standard health precautions;
- Maintain training and attendance records on all staff (paid and volunteer) at each facility.

RESPONSE

Response is the immediate reaction to a disaster. Certain aspects of the response may take place before the event if it is anticipated. Response yields to recovery.

Detection

Schools have a role in assessing the health of students. School personnel should be trained to monitor student's behavior and note any symptoms of illness.

Common Indicators of Infectious Disease in Children

Teachers who spend several continuous hours a day with their students, are in an excellent position to detect early physical and behavioral changes in students at school. They may observe differences in the usual pattern for a particular student, and deviation from a developmental "norm" for students of a given age. The physical and behavioral "indicators" listed below are nonspecific and do not in themselves suggest the presence of an infection.

- Appetite. Often, a student who is ill or becoming ill with an infection will exhibit changes in eating habits. He/she may "pick at" solid foods, eat lightly, want only certain foods, and/or prefer liquids.
- Behavior. Irritability may be associated with illnesses, often because of the accompanying fatigue, fever, and discomfort. Play activities may diminish and the student may become lethargic (drowsy or indifferent).
- Fever. Fever is a symptom of illness, but it does not automatically require therapy. Repeated low-grade fever may occur as the result of physiological changes in the body and may not cause any discomfort to the student. However, students with fever over 101°F and other symptoms should/need to be sent home from school, especially if other symptoms are apparent. The student's parent/guardian should be notified.
- Appearance. A pasty, pale appearance may signal an illness, especially if it is a change from a student's normal skin color. A new yellow tinge to the eyes or skin, or a flushed appearance with rosy cheeks and glassy or red eyes, may also indicate an illness.

- Rash. The diagnosis of rashes can be very difficult and even a licensed health care provider may require lab tests to confirm whether a certain disease is present. If a referral to a licensed health care provider is made, advise the student's parent/guardian to inform their licensed health care provider's office staff of the presence of a rash illness so that appropriate medical isolation can be arranged during the visit, Itchiness of the rash is not necessarily a signal of infection. A rash can be a symptom of a serious or unserious condition.

- Change in Bowel Habit. Diarrhea may accompany a number of infectious diseases. Conversely, sluggishness of the bowels and constipation may occur, sometimes with abdominal cramps. Cramps can be due to the inactivity of the ill student and the dehydration that often occurs during infections.

- Nasal Discharge and Obstruction. Clear nasal discharge may signal a cold or it may indicate an allergic reaction, especially if accompanied by watery eyes. Yellow or green discharge indicates an infection (usually viral or possibly bacterial) or obstruction by a foreign body. Breathing may be noisy. If breathing is labored, immediate medical referral is indicated.

- Sore Throat. A sore throat can be a minor problem. However, it may also accompany potentially more significant infections such as streptococcal pharyngitis, infectious mononucleosis, or even serious generalized illnesses. Check for accompanying fever and notify the parent/guardian. Recommend medical evaluation if the sore throat is accompanied by fever, difficulty swallowing, and/or swollen lymph nodes (glands).

- Cough. Coughs accompany some chronic conditions, allergic conditions, and many infectious diseases. Persistent coughs (lasting 3 weeks or more), especially with other symptoms such as fever, loss of appetite, and weight loss, need medical evaluation.

- Earache and Ear Discharge. A student may complain, pull at the ear, or put a hand to the ear if there is discomfort. When there is an earache, particularly when blood or pus is seen running from the ear, the student needs to be referred for medical care.

- Pain (Back, Limbs, Neck, Stomach). Leg and back pains are not uncommon during the course of infectious diseases. Stomach pains or cramps usually do not signal serious disease in children, although appendicitis must be considered when abdominal pain is severe or persistent. Gastrointestinal disturbances such as vomiting, diarrhea, and constipation may be accompanied by abdominal pain.

Symptomatic Treatment

- Symptomatic treatment of any illness in the school setting is prohibited unless the parent/guardian has complied with school policy on the administration of oral medications for symptomatic treatment of illness or injury. Aspirin should not be administered for viral illnesses in children under age 19 because of the possible association with Reyes Syndrome.

Infection Control

The key concepts of infection prevention and control are:

Handwashing – the single most effective way to prevent the spread of germs. Cover your cough – an effective way to reduce the spread of germs when coughing and sneezing. Proper diapering procedures – to reduce the spread of germs found in feces to hands, objects, and the environment. Cleaning, sanitizing, and disinfection – to reduce the presence of germs in the environment. Food safety – to reduce the spread of germs from improperly cooked and handled food. Exclusion guidelines – to reduce the opportunity for germs to spread from ill people to others. Immunizations– for list of resources for age appropriate immunizations and childcare and school requirements. Avoid sharing personal items – encourage children, students, and staff to NOT share items such as water bottles, food, utensils, beverages, straws, toothbrushes, lip gloss, lip balm, lipstick, towels, head gear, combs, brushes, etc. to prevent the spread of germs to others.

Self care – encourage staff and children to perform their own first aid, when age appropriate.

Barriers: Barriers may be used where there is a possibility of exposure to blood and body fluids (e.g., urine, stool, secretions from the nose and mouth, drainage from sores or eyes). One aspect of standard precautions is the use of barriers. The purpose of using barriers is to reduce the spread of germs to staff and children from known/unknown sources of infections and prevent a person with open cuts, sores, or cracked skin (non-intact skin) and their eyes, nose, or mouth (mucous membranes) from having contact with another person's blood or body fluids.

Examples of barriers that would be used for childcare and school settings include:

- Gloves when hands are likely to be soiled with blood or body fluids. Note: an incident of an allergic response to latex or powdered gloves may occur, but the risk from not using gloves of any kind is greater.
- CPR (cardiopulmonary resuscitation) barriers – CPR mask or shield.
- Eye protection and face mask when the face is likely to be splattered with another's blood or body fluid.
- Gowns when clothing likely to be splattered with another's blood or body fluid.
- Safety needles that facilitate safe and proper disposal of used needles

Exposure Response Strategies

- Direct any students affected with health issues to the school nurse, send home, or direct to appropriate medical personnel.
- Send sick employees home.
- Identify number and scope of potential and probable exposures.
- Isolate the infected students
- Notify administrative authorities and local health department. Follow reporting protocols.
- Identify spokesperson for the incident (School Director or appointee).
- Identify key messages, protecting student confidentiality.
- Collect health-related information needed for public communications to parents and the community.
- Communicate information about the infectious disease to the school community and any other stakeholders:
  - Possible physical symptoms;
  - At risk groups
  - Medical response – only health professionals should provide medical advice
  - Actions being taken.
  - Clean and sanitize rooms and facilities
  - Document actions, submit data and appropriate forms.

High Risk Populations

These individuals have high risk for harm from an emergency or disaster due to significant limitations in their personal care or self-protection abilities, mobility, vision, hearing, communication or health status. Such limitations may be the result of physical, mental or sensory impairments or medical conditions.

Some of these individuals may be reliant on specialized supports such as mobility aides (wheelchairs, walkers, canes, crutches, etc.), communication systems (hearing aids, TTY's, etc.), medical devices (ventilators, dialysis, pumps, monitors, etc.), prescription medication, or personal attendants. For some individuals, loss of these supports due to emergency-related power and communication outages, or transportation and supply disruptions, may be the primary or only risk factor.

- Identify populations at high risk for the outbreak and exclude from school/workplace, as appropriate.
- Note special considerations for children and give information to parents, pediatricians, and daycare providers. Include ages affected, signs and symptoms, medical treatment, and risk reduction.
- Provide information to caregivers for children regarding limiting children's exposure to others and to the news, reminding them to only give age appropriate information to children, and encouraging hand washing.
- Inform the community of risk factors with medically compromised individuals.

Exclusion Guidelines

The decision to exclude students who have an infectious disease from school should be made in conjunction with the school nurse, the State or local public health agency, health care professionals, and/or parents/guardians. These guidelines contain exclusion recommendations for each disease or condition. Students should be allowed to return to school once the exclusion period is met or a health care provider clears the student.

Generally, if any of the following conditions apply, exclusion from school should be considered:

- If the student does not feel well enough to participate comfortably in usual activities, it may be recommended that he/she stay or return home until feeling well.
- If the student requires more care due to illness than school personnel are able to provide.
- If the student has a high fever, behavior changes, persistent crying, difficulty breathing, lack of energy, uncontrolled coughing, or other signs suggesting a severe illness.
- If the student is ill with a potentially contagious illness and exclusion is recommended by a health care provider, the State or local public health agency, or these guidelines.

In cases where unvaccinated students are exposed to a vaccine preventable disease (such as measles, mumps, rubella, and pertussis), the State or local public health agency should be consulted in order to determine if exclusion of unvaccinated students is necessary.

If school personnel become ill with an infectious disease, the affected staff member should consult with a health care provider to determine if they can work. If ill with diarrhea or vomiting, school personnel should not work until the illness is over. This is especially important for staff who work in the cafeteria or handle food in any manner. A letter from the health care provider/physician may be required to return to work.

Social Distancing

Social distancing strategies are non-medical measures intended to reduce the spread of disease from person-to-person by discouraging or preventing people from coming in close contact with each other. These strategies include closing schools and public assemblies, cancelling athletic activities and social events, closing non-essential agency functions, implementing emergency staffing plans, increasing telecommuting and flexible scheduling and other options.

Quarantine

Quarantine is the physical separation and restriction of movement of individuals, family groups and communities who, though not ill, have been exposed to a contagious disease. Quarantine may be required to prevent the spread of infectious disease that may be transmitted to other individuals before illness develops or is recognized. Quarantines may be done at home or in a restricted area, depending on the specific nature of the infectious agent.

Isolation

Isolation applies to persons who are ill with a contagious disease. Isolation is the physical separation and restriction of movement of an individual who is ill or is suspected of having an infectious illness from those who are not ill and have not been exposed to the contagion. Isolation may be required if medically necessary and reasonable to treat, prevent, or reduce the spread of the disease. Individuals may be isolated in a health care facility, the individual's home or a non-health facility.

Communications

Communications with the public and health care providers will be one of the most critical strategies for containing the spread of the infectious disease and for managing the utilization of health care services. This plan's communications goals are to:

1. Provide accurate, consistent, and comprehensive information about the infectious disease, including case definitions, symptom management, treatment options, infection control measures, and reporting requirements.
2. Instill and maintain public confidence in the schools and the County's public health care systems and their ability to respond to and manage an emerging infectious disease environment.
3. Ensure an efficient mechanism for managing information between local County Department of Health Services, emergency response agencies, health system partners and the schools.
4. Contribute to maintaining order, minimizing public panic and fear, and facilitating public compliance by providing accurate, rapid, and complete information.
5. Address rumors, inaccuracies, and misperceptions as quickly as possible, and prevent the stigmatization of affected groups.
6. Ensure that all information release to the public is provided through the School Public Information Officer as identified in the School Emergency Operations Plan.

Reporting Requirements

Individuals treating or having knowledge of a reportable disease, whether the disease is suspected or confirmed, should report the case to the State or local public health agency. In most cases, health care providers or laboratories report diseases. In certain circumstances, school nurses and personnel should report diseases, such as when a student is suspected of having measles, chickenpox, a serious infectious disease, or when an outbreak occurs. It is important to remember that only qualified health care providers can diagnose an illness.

Regarding confidentiality, the Family Rights and Privacy Act prohibits sharing of health-related information except in certain well-defined circumstances, including, but not limited to: specified officials for audit or evaluation purposes, and appropriate officials in cases of health and safety emergences. Notifying the State or local public health agency of a reportable disease does not breach confidentiality laws.

When a case is reported, public health agencies may conduct an investigation to confirm the diagnosis, treatment, and cause of the illness, and determine the appropriate methods of disease control. Group outbreaks resulting from any cause, including foodborne outbreaks, must be reported to the State or local public health agency within 24 hours. In an outbreak situation, the goal of the public health agency is to assist the school in preventing further spread of the illness and to try to determine the cause of the outbreak.

To report a disease or outbreak, contact the Butte County Public Health Department:

Submit completed Confidential Morbidity Report (CMR) via fax to Oroville: 530.538.5387 or Chico: 530.879.3309. For questions about reporting, or for a disease that must be reported IMMEDIATELY, during regular business hours (Monday-Friday 8:00AM5:00PM excluding holidays) call 530. 5523929. For IMMEDIATE reports after hours, please contact our exchange at 530.332.2462. For CMR's visit http://www.buttecounty.net/ph/Programs/Communicable-Disease/OtherDiseases/Report. The CMR includes a reporting document as well as a list of diseases that should be reported and the timeline for reporting.

To the extent the following information is available, it should be reported when contacting the Public Health Department:

Patient's name
Diagnosis
Date of birth
Sex
Ethnicity
Address
Phone number
Name and address of the responsible health care provider • Pertinent laboratory test results (if applicable)

RECOVERY

School recovery from the spread of an infectious disease will begin when school officials receive notice from the County Public Health Department that schools may resume normal operations. The School Director will determine if normal supplies, resources and response systems are adequate to manage ongoing school activities.

In consultation with County Department of Health and Human Services, the School Administration will recommend specific actions to be taken to return the schools to pre-event status.

The School will:

Assess the economic and educational impact of the infectious disease on the schools.

- Evaluate the response actions taken by the school as a result of the infectious disease
- Determine effectiveness of existing plan to respond to similar events in the future.
- Revise existing plan as necessary to address any deficiencies.

After Action Review

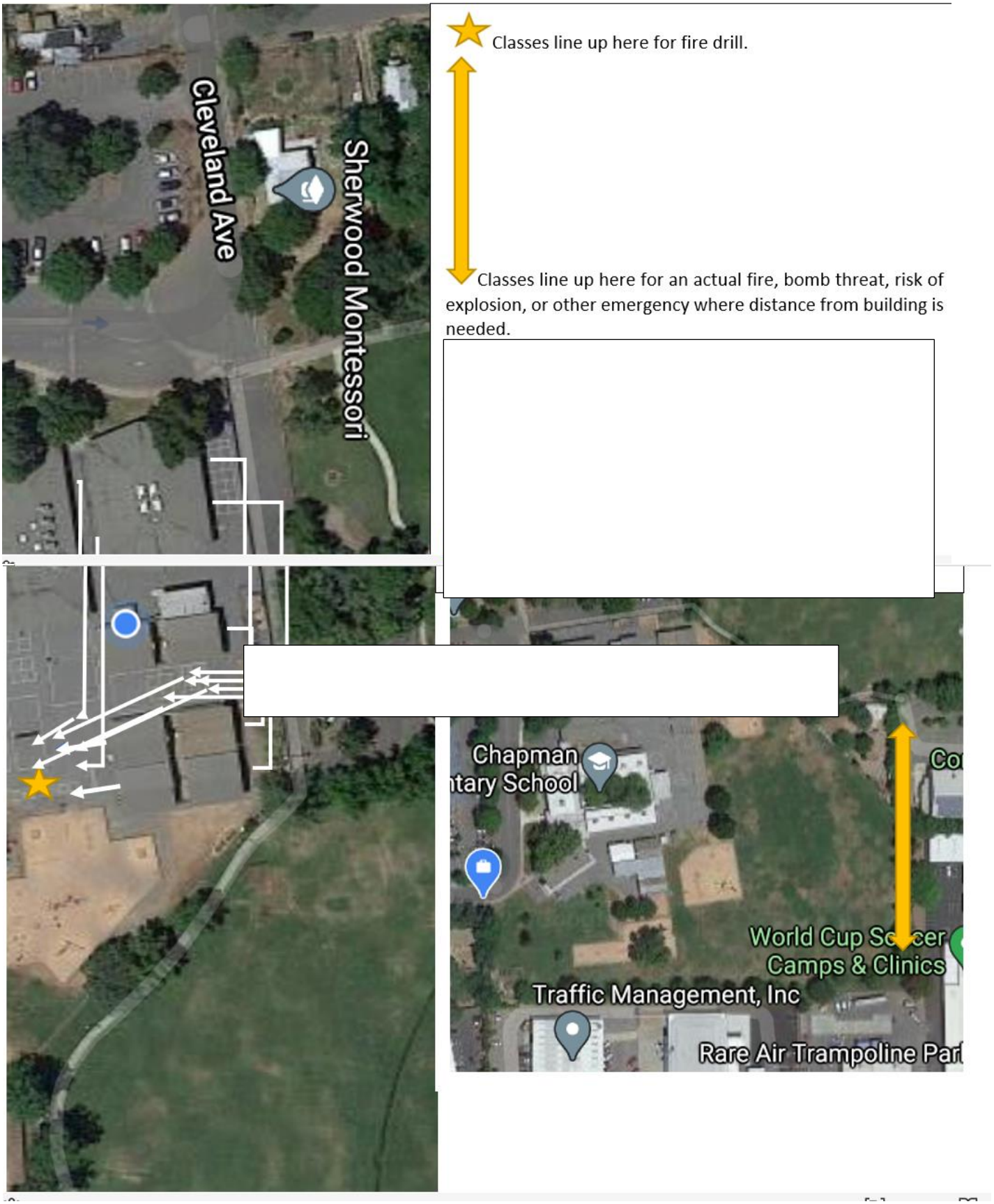
- Implement sanitization and disinfection procedures
- Deploy solid waste disposal plans
- Review processes and incident communication protocols
- Review impact on the school and community
- Evaluate lessons learned
- Review and revise procedures, as needed
- Retrain staff

Document Archive

Maintain all information for the current year and the three prior years:

- Reports provided to the local Public Health Department or other government agencies
- Attendance rosters of affected classrooms or schools
- Reports from students and staff with symptoms of illness
- Reports showing what materials were provided to families and staff
- Actions taken by nurses, teachers, office staff and school administrators

**Emergency Evacuation Map**



SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Plan for Safe Reopening**

**Date:** February 17, 2022

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**SUMMARY**

A requirement of receiving Coronavirus relief funds was the updating of a School Plan for Safe Reopening every six months and posting on the school's website.

**DISCUSSION**

The School Plan for Safe Reopening, retitiled *School Plan for Safe Operations During COVID-19 Pandemic* presented has the required componenets. Presentation at this public meeting serves to provide an opportunity for stakeholders to give input.

**ACTION REQUESTED**

Adopt plan.

Attachment: *School Plan for Safe Operations During COVID-19 Pandemic*

# School Plan for Safe Operations During COVID-19 Pandemic

## School Information

| School Name | School Administrator | Plan Date | Closure Date | Reopening Date |
|---|---|---|---|---|
| Sherwood Montessori | Michelle Yezbick, Director | Updated 2/17/2022 | March 23, 2020 | October 8, 2020 |

## Introduction

The following School Plan for Safe Reopening is based on the California Department of Education's (CDE) guidance publication, *Stronger Together: A Guidebook for the Safe Reopening of California's Public Schools*.

Per CDE, this guidance was created through the statewide reopening schools task force that fostered a collaborative process for our educators and stakeholders to lend their important voices. Also informed by the technical assistance and advice of many health and safety organizations including the Centers for Disease Control, California Department of Public Health, California Division of Occupational Safety and Health, the intent of this document is to be a guide for the local discussion on safely reopening schools.

*Stronger Together: A Guidebook for the Safe Reopening of California's Public Schools*, as well as additional guidance can be downloaded at https://www.cde.ca.gov/ls/he/hn/strongertogether.asp.

The following checklist provides information regarding Sherwood Montessori's plan for safe reopening and covers the following main categories:

| Main Categories |
|---|
| Local Conditions to Guide Reopening Decisions |
| Plan to Address Positive COVID-19 Cases or Community Surges |
| Injury and Illness Prevention Plan |
| Campus Access |
| Protective Equipment |
| Physical Distancing |
| Cleaning/Disinfecting |
| Employee Issues |
| Communication with Students, Parents, Employees, Public Health Officials, and the Community |

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## Flexibility or Lifting of State Stay-Home Order

| Condition Met | Condition Assessed |
|---|---|
| Yes | The state has lifted or relaxed the stay-home order to allow schools to physically reopen. |

From the "Blueprint for a Safer Economy":

Schools may not reopen fully for in-person instruction until the county has been in the Substantial (red) tier for 5 days. School officials may decide to conduct in-person instruction for a limited set of students in small cohorts.

Note on exception: Schools that have already re-opened if the county was in a less restrictive tier do not have to close. However, if a school had not already reopened for in-person instruction, it may not reopen until the county moves back to the Substantial (red) tier for 5 consecutive days.

Sherwood opened first to a small cohort of a limited set of students on October 8, 2020. While the County was in Red Tier, Sherwood opened classrooms for families who chose to attend in-person starting with the youngest students. By November 30, 2020 there were students attending in-person at all age levels, as well as students continuing with distance learning at all levels.

## Flexibility or Lifting of County Stay-Home Order

| Condition Met | Condition Assessed |
|---|---|
| Yes | The county has lifted or relaxed the stay-home or shelter-in-place order to allow schools to physically reopen. |

Butte County schools were permitted to open with safety measures once we were in the Red Tier for two weeks, on October 13, and Sherwood did open in-person instruction during this window.

## Local Public Health Clearance

| Condition Met | Condition Assessed |
|---|---|
| Yes | Local public health officials have made determinations, including, but not limited to, the following:<br>i. Testing Availability. Consult with local public health officials to ensure adequate tests and tracking/tracing resources are available for schools to reopen. Employees have access to COVID19 testing at regular and ongoing intervals.<br>ii. Sufficient duration of decline or stability of confirmed cases, hospitalizations, and deaths.<br>iii. Sufficient surge capacity exists in local hospitals. |

The school is administering rapid antigen tests. Area hospitals are impacted, but school closures have been linked to increases in community transmission, changing the weight of this assessed condition.

### Equipment Availability

| Condition Met | Condition Assessed |
|---|---|
| Yes | i. Have sufficient protective equipment to comply with California Department of Public Health (CDPH) guidance for students and staff appropriate for each classification or duty, as well as relevant California Division of Occupational Safety and Health Administration (Cal/OSHA) requirements.<br>ii. Have a plan for an ongoing supply of protective equipment. iii. iii. Purchase a sufficient number of no-touch thermal scan thermometers for symptom screenings.<br>iv. Consider the differing requirements of PPE/EPG for the differing populations of students with disabilities (i.e., for those requiring medical procedures, toileting, lifting and mobility assistance). |

We are and have been stocked with PPE and no-touch thermal scan thermometers and have plans to replenish supplies.

### Cleaning Supply Availability

| Condition Met | Condition Assessed |
|---|---|
| Yes | i. Have enough school-appropriate cleaning supplies to continuously disinfect the school site in accordance with CDPH guidance. ii. Ensure sufficient supplies of hand sanitizers, soap, handwashing stations, tissues, no-touch trash cans, and paper towels. |

All supplies and cleaning procedures that have been recommended by CDPH are in place. In addition, beyond the requirements, each classroom has air purifiers with interior UV lights to destroy any pathogens.

## Plan to Address Positive COVID-19 Cases or Community Surges

### Plan for Repeated Closure

| Condition Met | Condition Assessed |
|---|---|
| Yes | Establish a plan to close schools again for physical attendance of students, if necessary, based on public health guidance and in coordination with local public health officials. |

Sherwood will revert to the distance learning model we used from August, 2020 until November, 2020 when we began our hybrid model if we are informed it is necessary by public health guidance.
Sherwood has offered Independent Study for students who are required to isolate or quarantine since late September, 2021.

### Response to Positive Tests

| Condition Met | Condition Assessed |
|---|---|
| Yes | In accordance with CDPH guidance, when a student, teacher, or staff member or a member of their household tests positive for COVID-19 and has exposed others at the school implement the following steps:<br><br>i. In consultation with the local public health officials, the appropriate school official may consider whether school closure is warranted and length of time based on the risk level within the specific community as determined by the local public health officer.<br>ii. In accordance with standard guidance for isolation at home after close contact, the classroom or office where the COVID-19-positive individual was based will typically need to close temporarily as students or staff isolate.<br>iii. Additional close contacts at school outside of a classroom should also isolate at home.<br>iv. Additional areas of the school visited by the COVID-19-positive individual may also need to be closed temporarily for cleaning and disinfection.<br>v. Develop a plan for continuity of education, medical and social services, and meal programs and establish alternate mechanisms for these to continue. |

Students in isolation will be provided Independent Study and provided with devices for synchronous instruction/live interaction. In areas that are determined to have been visited by a COVID-19 positive individual, the plan is to close the area until it can be cleaned and disinfected with safety precautions in place (PPE for custodians and cleaning solutions and practices in line with health guidance). Meals are provided by Chico Unified School District. Sherwood Montessori is not a medical facility and does not provide medical services, aside from self-administered rapid antigen tests for COVID-19. Social services for students who qualify to receive them through Individual Education Plans will continue via remote. Sherwood shall follow the most updated recommendations and health orders provided by the California Department of Public Health (CDPH) and the Butte County Department of Public Health (BCDPH).

## Injury and Illness Prevention Program (IIPP)

### Plan for Repeated Closure

| Condition Met | Condition Assessed |
|---|---|
| Yes | Update the IIPP to address unique circumstances during the COVID-19 crisis and make updates accessible to employees and parents. |

The IIPP was updated to include extensive details regarding infectious disease and circumstances during the COVID-19 crisis. This was included in the Comprehensive School Safety Plan which is provided to all employees and is posted on the school website: http://www.sherwoodmontessori.org/Family-Resources/index.html

## Campus Access

Develop a plan to minimize access to campus, and limit nonessential visitors, facility use permits, and volunteers.

### People Showing Symptoms of COVID-19

| Condition Met | Condition Assessed |
|---|---|
| Yes | Exclude any student, parent, caregiver, visitor, or staff showing symptoms of COVID-19 (reference CDC and CDPH guidelines for COVID-19 symptoms). Staff should discuss with the parent or caregiver and refer to the student's health history form or emergency card to identify whether the student has a history of allergies, which would not be a reason to exclude. |

Staff and students who are sick or have had close contact with someone with COVID-19 will be required to follow current CDPH/BCDPH isolation and quarantine guidance. Guidance for schools can be found here: https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/COVID-19/K-12-Guidance-2021-22-School-Year.aspx

Staff and students will be asked to do wellness checks at home before coming to campus, including a temperature read and checking for the following symptoms:

Fever or chills
Cough
Shortness of breath
Muscle pain or body aches
Headache
Sore throat
Fatigue
Congestion or runny nose
Nausea or vomiting
Diarrhea
New loss of taste or smell

As of 2/17/2022, guidance for staff members and students with symptoms of COVID-19 infection not to return for in-person instruction until they have met CDPH criteria to return to school for those with symptoms: https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/COVID-19/K-12-Guidance-2021-22-School-Year.aspx
i. At least 24 hours have passed since resolution of fever without the use of fever-reducing medications; and
ii. Other symptoms have improved; and
iii. They have a negative test for SARS-CoV-2, OR a healthcare provider has provided documentation that the symptoms are typical of their underlying chronic condition (e.g., allergies or asthma) OR a healthcare provider has confirmed an alternative named diagnosis (e.g., Streptococcal pharyngitis, Coxsackie virus), OR at least 10 days have passed since symptom onset.

### Monitoring Staff

| Condition Met | Condition Assessed |
|---|---|
| Yes | Monitor staff and students throughout the day for signs of illness. Determine any special or unique needs for students with disabilities related to planned district or schoolwide procedures. |

Teachers and staff will be asked to monitor themselves, each other, and students throughout day for illness. Students with disabilities will be considered individually and special needs will be addressed.

**Students Entering Campuses**

| Condition Met | Condition Assessed |
|---|---|
| Yes | i. Passive Screening. Instruct parents to screen students before leaving for school (check temperature to ensure temperatures below 100.4 degrees Fahrenheit, observe for symptoms outlined by public health officials) and to keep students at home if they have symptoms consistent with COVID-19 or if they have had close contact with a person diagnosed with COVID19.<br>ii. Active Screening. Engage in symptom screening as students enter campus and buses, consistent with public health guidance, which includes visual wellness checks and temperature checks with no-touch thermometers (check temperature to ensure temperatures below 100.4 degrees Fahrenheit), and ask all students about COVID-19 symptoms within the last 24 hours and whether anyone in their home has had COVID-19 symptoms or a positive test.<br>1. If a thermometer requiring a touch method (under the tongue or arm, forehead, etc.) is the only type available, it should only be used when a fever is suspected and caution is taken by temperature screeners, such as by wearing gloves, eye protection, and a mask.<br>2. Thermometers must be properly cleaned and disinfected after each use.<br><br>iii. All students must wash or sanitize hands as they enter campuses and buses.<br>iv. Provide supervised, sufficient points of access to avoid larger gatherings. v. Use privacy boards or clear screens when practicable.<br>vi. If a student is symptomatic while entering campus or during the school day:<br>1. Students who develop symptoms of illness while at school should be separated from others right away, preferably isolated in an area through which others do not enter or pass. If more than one student is in an isolation area, ensure physical distancing.<br>2. Any students or staff exhibiting symptoms should be required to immediately wear a face covering and wait in an isolation area until they can be transported home or to a health care facility.<br>3. Students should remain in isolation with continued supervision and care until picked up by an authorized adult.<br>4. Follow established guidelines for triaging students in the health office, recognizing not all symptoms are COVID-19 related.<br>5. Advise parents of sick students that students are not to return until they have met CDC criteria to discontinue home isolation.<br>vii. Develop a plan for if students are symptomatic when boarding the bus. |

i. & ii. Staff and students are asked to do wellness checks at home before coming to campus, including a temperature read and checking for the following symptoms:

Fever or chills
Cough
Shortness of breath
Muscle pain or body aches
Headache
Sore throat
Fatigue
Congestion or runny nose
Nausea or vomiting
Diarrhea
New loss of taste or smell

ii. Teachers and staff are asked to monitor themselves, each other, and students throughout day for illness.

iii. Touchless thermometers are being used for staff and students who are not feeling well; each classroom and the office have them.

ii. Teachers and staff have been trained and were retrained prior to opening on proper techniques for washing hands, avoiding contact with eyes, nose and mouth, and covering coughs/sneezes.

Teachers and staff teach students proper handwashing techniques and monitor handwashing routines upon arrival, before meals, upon returning to the classroom from outdoor play or P.E. instruction, or whenever a student has come in contact with a potentially contaminated surface.

iii. Plexiglass screens are being used in classrooms and the office.

iv. Staff or students who become sick at school will wait in the designated area in the office for transportation home.

1. A smaller, enclosed space in the office is set up to be an isolation area. If more students exhibit symptoms, there are three other spaces in the office that can be used for isolation.
2. All students must wear face coverings indoors on campus, including in the isolation area.
3. Student will be supervised by office staff until picked up by an authorized adult.
4. Sherwood staff will follow guidelines established by local health officials to determine if all symptoms should be treated as possible COVID-19 infection or if students' health histories can be taken into consideration.
5. Parents of sick students will be advised that students are not to return until they have met local department of public health or CDPH criteria to discontinue home isolation.

vii. Sherwood does not have a bus.

**Staff Entering Campuses**

| Condition Met | Condition Assessed |
|---|---|
| Yes | i. Passive Screening. Instruct staff to self-screen before leaving for work (check temperature to ensure temperatures below 100.4 degrees Fahrenheit, check for symptoms outlined by public health officials) and to stay home if they have symptoms consistent with COVID-19 or if they have had close contact with a person diagnosed with COVID-19.<br>ii. Active Screening. Engage in symptom screening as staff enter worksites, consistent with public health guidance, which includes visual wellness checks and temperature checks with no-touch thermometers (check temperature to ensure temperatures below 100.4 degrees Fahrenheit), and ask all staff about COVID-19 symptoms within the last 24 hours and whether anyone in their home has had COVID-19 symptoms or a positive test.<br>1. If a thermometer requiring a touch method (under the tongue or arm, forehead, etc.) is the only type available, it should only be used when a fever is suspected.<br>2. Thermometers must be properly cleaned and disinfected after each use.<br>iii. All staff must wash or sanitize hands as they enter worksites.<br>iv. Exclude employees who are exhibiting symptoms from the workplace.<br>1. Staff members who develop symptoms of illness should be sent to medical care. Have emergency substitute plans in place.<br>2. Create a procedure for reporting the reasons for the exclusions.<br>3. Advise sick staff members not to return until they have met CDC criteria to discontinue home isolation. |

i. Staff are asked to do wellness checks at home before coming to campus, including a temperature read and checking for the following symptoms:

Fever or chills
Cough
Shortness of breath
Muscle pain or body aches
Headache
Sore throat
Fatigue
Congestion or runny nose
Nausea or vomiting
Diarrhea
New loss of taste or smell

ii. Staff voluntarily engage in self-screening prior to coming to work. Staff are not subject to health screening at work. No health professionals qualified to conduct such a screening are employed or contracted by the school with the exception of our school nurse who is present on campus one morning per week. Our nurse is happy to conduct health screening for staff who request it, and thermometers are available for staff to self-screen. No compulsory health screenings are conducted against employees' will.

1. & 2. Touchless thermometers are available in every classroom and the office.

iii. All staff wash or sanitize hands as they enter worksites.

iv. Employees who exhibit symptoms may not come to work.

1. Staff members who develop symptoms may not come to the workplace. They may seek medical care if they choose to, and substitutes are used when needed. Staff members with symptoms must complete 10 days of isolation or may return to work with a negative COVID-19 test after the 5th day of exposure or onset of symptoms.

2. & 3. Employees with symptoms report the needed absence to the school director, who keeps this information confidential and tracks 10 days required isolation.

### Outside Visitors and Groups

| Condition Met | Condition Assessed |
|---|---|
| Yes | i. Limit access to campus for parents and other visitors.<br>ii. Evaluate whether and to what extent external community organizations can safely utilize the site and campus resources. Ensure external community organizations that use the facilities also follow the school's health and safety plans and CDPH guidance.<br>iii. Review facility use agreements and establish common facility protocols for all users of the facility.<br>iv. Establish protocol for accepting deliveries safely.<br>v. Charter School Co-locations<br>Update facility use agreements to address unique circumstances during the COVID-19 crisis, ensuring that organizations that are using the same facility have agreed to the same understandings about how to reopen in a healthy and safe way. Establish a protocol for responding to site concerns regarding health and safety issues that arise during the pandemic that is collaborative and meets the needs of all stakeholders. |

i. Visitors must wear face coverings when indoors in the presence of students.

iii. & v. Facility Use Agreement with CUSD was reviewed. Changes to meal service and use of outdoor playground area were made with health guidance input.

iv. Deliveries are made to the office, physical distancing is used and transactions occur quickly (less than five minutes).

v. Health and safety issues that arise during the pandemic are addressed with consultation with school nurse and/or local health department. Any staff member, student, or parent/guardian can bring a health concern to the school director via phone call, email, meeting, or in-person compensation.

## Hygiene

Plan to address hygiene practices to ensure personal health and safety in school facilities and vehicles.

## Handwashing

| Condition Met | Condition Assessed |
|---|---|
| Yes | In accordance with CDPH and Cal/OSHA guidance and in consultation with local public health officials, develop a plan for handwashing that includes:<br>i. Providing opportunities for students and staff to meet handwashing frequency guidance. ii. Ensuring sufficient access to handwashing and sanitizer stations. Consider portable handwashing stations throughout a site and near classrooms to minimize movement and congregations in bathrooms to the extent possible. iii. Ensuring fragrance-free hand sanitizer (with a minimum of 60 percent alcohol) is available and supervised at or near all workstations and on buses. Children under age nine should use hand sanitizer under adult supervision. Call Poison Control if consumed: 1-800-222-1222. Note: frequent handwashing is more effective than the use of hand sanitizers. |

i. Teachers and staff teach students proper handwashing techniques and monitor handwashing routines upon arrival, before meals, upon returning to the classroom from outdoor play or P.E. instruction, or whenever a student has come in contact with a potentially contaminated surface.

ii. Sanitizers are installed in every classroom and in the office. Additional bottles of hand sanitizer are available for classrooms from the office.

iii. Sanitizers are installed in every classroom and in the office. Solutions are fragrance-fee and at least 60% alcohol. Children under age nine will not use or access hand sanitizer without adult supervision (there is no sanitizer in bathrooms, bathrooms have working sinks for handwashing).

## Training of Proper Handwashing Techniques and PPE/EPG Use

| Condition Met | Condition Assessed |
|---|---|
| Yes | Train staff and students on proper handwashing techniques and PPE/EPG use, including the following:<br>i. Scrub with soap for at least 20 seconds or use hand sanitizer if soap and water are not accessible. Staff and students should use paper towels (or single use cloth towels) to dry hands thoroughly.<br>ii. Wash hands when: arriving and leaving home; arriving at and leaving school; after playing outside; after having close contact with others; after using shared surfaces or tools; before and after using restroom; after blowing nose, coughing, and sneezing; and before and after eating and preparing foods.<br>iii. CDC guidance on proper PPE use. |

i. & ii. Teachers and staff teach students proper handwashing techniques and monitor handwashing routines upon arrival, before meals, upon returning to the classroom from outdoor play or P.E. instruction, or whenever a student has come in contact with a potentially contaminated surface. iii. Staff and students are trained on proper PPE use.

### Training for Face and Nose Covering

| Condition Met | Condition Assessed |
|---|---|
| Yes | Teach staff and students to:<br>i. Use tissue to wipe the nose and cough and sneeze inside the tissue.<br>ii. Not touch the face or face covering. |

i. Staff and students are taught to use tissue to wipe the nose and cough and sneeze inside the tissue.
ii. Staff and students are taught to not touch their faces or face coverings.

Protective Equipment
Plan to address protective equipment needs to ensure personal health and safety in school facilities and vehicles.

### PPE Training

| Condition Met | Condition Assessed |
|---|---|
| Yes | According to CDC guidance:<br>i. Training and information should be provided to staff and students on proper use, removal, and washing of cloth face coverings.<br>ii. Face coverings are not recommended for anyone who has trouble breathing or is unconscious, incapacitated, or otherwise unable to remove the covering without assistance. LEAs should make reasonable accommodations such as a face shield with a cloth drape for those who are unable to wear face coverings for medical reasons. Per Cal/OSHA, considerations for face shields should include a cloth drape attached across the bottom and tucked into shirt.<br>iii. Cloth face coverings are meant to protect other people in case the wearer is unknowingly infected (many people carry COVID-19 but do not have symptoms). Cloth face coverings are not surgical masks, respirators, or personal protective equipment. |

i., ii. &iii. Staff and students are trained on proper use, removal, and washing of cloth face coverings and the distinction between these and surgical masks, respirators, or PPE. Reasonable accommodations will be made for individuals unable to wear a face covering.

**Staff Protective Equipment**

| Condition Met | Condition Assessed |
|---|---|
| Yes | i. As recommended by the CDC, all staff should wear face coverings. Per CDPH guidance, teachers could use face shields with drapes, which enable students to see their faces and to avoid potential barriers to phonological instruction.<br>ii. Provide masks if the employee does not have a clean face covering.<br>iii. Provide other protective equipment, as appropriate for work assignments.<br>1. For employees engaging in symptom screening, provide surgical masks, face shields, and disposable gloves.<br>2. For front office and food service employees, provide face coverings and disposable gloves.<br>3. For custodial staff, provide equipment and PPE for cleaning and disinfecting, including:<br>A. For regular surface cleaning, provide gloves appropriate for all cleaning and disinfecting.<br>B. Classified staff engaged in deep cleaning and disinfecting should be equipped with proper PPE for COVID-19 disinfection (disposable gown, gloves, eye protection, and mask or respirator) in addition to PPE as required by product instructions. All products must be kept out of children's reach and stored in a space with restricted access.<br>C. Cal/OSHA requires that PPE be provided and worn to effectively protect employees from the hazards of the cleaning products used and training be provided to staff on the hazards of chemicals. |

i. All staff will wear face coverings. Masks with clear plastic are available for phonological instruction ii. Masks are provided for any staff or student who does not have one. loth and disposable masks are available. iii. 1. & 2. Other protective equipment is provided as appropriate, including: N95 masks, surgical masks, gloves 3. A. Contracted custodians are equipped by their employer with PPE.

B. Cleaning and PPE for disinfection is available should the school require COVID-19 disinfection. Products are kept out of children's reach in an area in the office with restricted access.

C. Cleaning products used for cleaning and disinfecting include ingredients that are known to kill the COVID-19 virus and are safe to use when wearing protective equipment and used with proper ventilation.

**Student Protective Equipment**

| Condition Met | Condition Assessed |
|---|---|
| Yes | i. Students should use cloth face coverings, especially in circumstances when physical distancing cannot be maintained. If an LEA requires students to wear face coverings, then the LEA must provide face coverings to be used. Consider how the LEA will address students with disabilities who refuse or are not able to wear masks. At a minimum, face coverings should be worn:<br>1. While waiting to enter the school campus.<br>2. While on school grounds (except when eating or drinking).<br>3. While leaving school.<br>4. While on a school bus.<br>Driver has access to surplus masks to provide to students who are symptomatic on the bus. |

i. Students are required to wear cloth face coverings or disposable surgical masks.

1. Students wear masks indoors. In the event the student comes to school with no mask, they are provided one.

2. Current guidance does not require students to wear masks outdoors.

## Physical Distancing

Plan to meet physical distancing standards in school facilities and vehicles. Clearly define how staff can honor physical distancing recommendations, yet meet student medical, personal, or support needs. Determine how adequate space and facilities will be utilized to maintain health and safety of students and staff, especially when tending to individual student medical or personal needs.

### Plan to Limit the Number of Persons in Campus Spaces

| Condition Met | Condition Assessed |
|---|---|
| ~~Yes~~ | Plan to limit the number of people in all campus spaces to the number that can be reasonably accommodated while maintaining a minimum of 6 feet of distance between individuals. (6 feet is the current minimum recommendation for physical distancing from the CDC, but it is important to pay attention to future modifications in public health recommendations.) |

Face covering is currently prioritized over distancing in accordance to updated guidance.

### Creating Smaller Student/Educator Cohorts & Minimizing Movement

| Condition Met | Condition Assessed |
|---|---|
| ~~Yes~~ | To the extent possible, and as recommended by the CDC, attempt to create smaller student/ educator cohorts to minimize the mixing of student groups throughout the day. Minimize movement of students, educators, and staff as much as possible. |

We are no longer keeping stable cohorts as updated guidance does not require it.

### Alternative to Physical Distancing

| Condition Met | Condition Assessed |
|---|---|
| Yes | In a circumstance where sufficient physical distancing is difficult or impossible, such as when students enter or exit a school bus in proximity to the bus driver, all individuals, including staff and students, should wear face coverings that cover the mouth and nose consistent with public health guidance. To be clear, face coverings are not a replacement for physical distancing, but they should be used to mitigate virus spread when physical distancing is not feasible. |

All staff and students are required to wear face coverings indoors as directed by health guidance.

### Student Physical Distancing

| Condition Met | Condition Assessed |
|---|---|
| Yes | LEAs should plan to:<br>i. Limit number of students physically reporting to school, if needed to maintain physical distancing.<br>1. Determine student and staff capacity of each school meeting 6-foot physical distancing objectives.<br>2. Consider various strategies outlined in the Instructional Program Models in the guidance document, such as early/late start times and blended learning models.<br>ii. The CDC recommends virtual activities in lieu of field trips and intergroup events. iii. Post signage and install barriers to direct traffic around campus. |

1. Determine maximum capacity for students of each vehicle while meeting 6-foot physical distancing objectives.
2. Create a plan for seating based on maximum capacity determined above, and develop a plan for bus routes that accommodates the capacity limitations. Mark or block seats that must be left vacant. Sample seating options:
   A. Option 1: Seat one student to a bench on both sides of the bus, skipping every other row.
   B. Option 2: Seat one student to a bench, alternating rows on each side to create a zigzag pattern on the bus.
3. Instruct students and parents to maintain 6-foot distancing at bus stops and while loading and unloading.
4. Seat students from the rear of the bus forward to prevent students from walking past each other. To prevent students from walking past one another, afternoon runs should be boarded based on the order in which students will be dropped off. (Students who get off first should board last and sit in the front.)
5. Students and staff should wear face coverings at bus stops and on buses.

v. Playgrounds/Outside Spaces/Athletics
1. Increase supervision to ensure physical distancing.
2. Physical education (PE) and intramural/interscholastic athletics should be limited to activities that do not involve physical contact with other students or equipment until advised otherwise by state/local public health officials.

vi. Classrooms
1. Determine maximum capacity for students of each classroom while meeting 6-foot physical distancing objectives.
2. In accordance with CDC and CDPH guidance, ensure desks are a minimum of 6 feet apart and arrange desks in a way that minimizes face-to-face contact.
3. If necessary, utilize other campus spaces for instructional activities (e.g., lecture halls, gyms, auditoriums, cafeterias, outdoors).
4. If necessary, broadcast to other classrooms and students distance learning at home.
5. Increase staffing to ensure physical distancing for younger students and students with special needs.
6. Arrange developmentally appropriate activities for smaller group activities and rearrange furniture and play spaces to maintain separation, when possible.
7. Address physical distancing objectives as students move between classrooms.
8. Address potential issues from physical distancing rules that could result in unintended segregation of students with disabilities on campuses away from peers without disabilities.

vii. Food Service
1. Consider strategies to limit physical interaction during meal preparation and meal service (e.g., serving meals in classrooms, increasing meal service access points, staggering cafeteria use).
2. Suspend use of share tables and self-service buffets for food and condiments.
3. Install physical barriers, such as sneeze guards and partitions, at point of sale and other areas where maintaining physical distance of 6 feet is difficult.
4. With an approved National School Lunch Program waiver, offer meal delivery for students quarantined or in a home-based cohort.
5. If providing meal service in classrooms, plan for cleaning and trash removal.

Student physical distancing is no longer required. The current guidance prioritizes face covering and testing to identify individuals positive for COVID, which we are doing.

### Staff Physical Distancing

| Condition Met | Condition Assessed |
|---|---|
| ~~Yes~~ | i. Develop a plan that ensures physical distancing among staff in their work environment to reduce spread of the virus that includes:<br>1. Avoiding staff congregation in work environments, break rooms, staff rooms, and bathrooms.<br>2. Avoiding grouping staff together for training or staff development. Consider conducting the training virtually or, if in-person, ensure distancing is maintained.<br>ii. Adjust staff schedules (through negotiations) to accommodate new student schedules and physical distancing strategies.<br>iii. In accordance with Cal/OSHA regulations and guidance, evaluate all workspaces to ensure that employees can maintain physical distancing to the extent possible.<br>1. Where possible, rearrange workspaces to incorporate a minimum of 6 feet between employees and students.<br>2. If physical distancing between workspaces or between employees and students and visitors is not possible, add physical barriers that cannot be moved to separate workspaces. |

Physical distancing is no longer required. The current guidance prioritizes face covering and testing to identify individuals positive for COVID, which we are doing.

## Cleaning and Disinfecting

Plan to meet cleanliness and disinfecting standards in school facilities and vehicles.

### Overall Cleanliness Standards

| Condition Met | Condition Assessed |
|---|---|
| Yes | Schools must meet high cleanliness standards prior to reopening and maintain a high level during the school year. |

Sherwood has increased custodial services to maintain a high level of cleanliness.

### Sharing Avoidance

| Condition Met | Condition Assessed |
|---|---|
| ~~Yes~~ | In accordance with CDC guidance, avoid sharing of electronic devices, toys, books, and other games or learning aids. |

Updated guidance takes into account the lack of transmission by fomites.

### Items Difficult to Clean and Sanitize

| Condition Met | Condition Assessed |
|---|---|
| Yes | Limit stuffed animals and any other toys that are difficult to clean and sanitize. |

Pillows, stuffed animals, and other difficult to clean items are currently being stored.

### Safe Use of Disinfectants

| Condition Met | Condition Assessed |
|---|---|
| Yes | In accordance with CDC and California Department of Pesticide Regulation (CDPR) guidance, and in consultation with local public health officials, develop a plan that includes:<br>i. A safe and correct application of disinfectants using personal protective equipment and ventilation recommended for cleaning.<br>ii. Disinfecting surfaces between uses, such as:<br>1. Desks and tables<br>2. Chairs<br>3. Seats on bus<br>4. Keyboards, phones, headsets, copy machines<br>iii. Disinfecting frequently—at least daily—high-touch surfaces, such as:<br>1. Door handles<br>2. Handrails<br>3. Drinking fountains<br>4. Sink handles<br>5. Restroom surfaces<br>6. Toys, games, art supplies, instructional materials<br>7. Playground equipment iv. When choosing disinfecting products, using those approved for use against COVID-19 on the Environmental Protection Agency (EPA) List N: Disinfectants for Use Against SARS-CoV-2 and follow product instructions. |
| | 1. To reduce the risk of asthma related to disinfecting, programs should aim to select disinfectant products on the EPA List N with asthma-safer ingredients (hydrogen peroxide, citric acid, or lactic acid).<br>2. Avoid products that mix these ingredients with peroxyacetic acid, sodium hypochlorite (bleach), or quaternary ammonium compounds, which can cause asthma.<br>3. Use disinfectants labeled to be effective against emerging viral pathogens, following label directions for appropriate dilution rates and contact times.<br>v. When cleaning, airing out the space before children arrive. Plan to do thorough cleaning when children are not present.<br>vi. Closing off areas used by any sick person and not using before cleaning and disinfection. To reduce risk of exposure, wait 24 hours before cleaning and disinfecting. If it is not possible to wait 24 hours, wait as long as possible. |

i. Disinfectants are selected for their ability to destroy the COVID-19 virus when used properly while also containing only safe compounds when used properly. PPE is supplied to custodians by their employer, and staff is provided with PPE for cleaning during the school day. The air conditioning/heating units are new (installed in May, 2018) and high quality and exceed the expectations for providing clean, fresh air circulation even when windows and doors are shut. Air purifiers with internal UV units are being used in every classroom.

ii. Surfaces are cleaned and disinfected nightly, including: desks and tables, chairs, phones and copy machines. We have no bus. Keyboards of shared devices are covered with disposable clear plastic wrap that can be changed between uses.

iii. Surfaces that are disinfected daily include: door handles, drinking fountains, handrails, sink handles, and restroom surfaces.

iv. Disinfecting products have been approved for use against COVID-19 and are found on the Environmental Protection Agency (EPA) List N: Disinfectants for Use Against SARS-CoV-2. Product instructions are followed.

v. Thorough cleaning occurs nightly by custodians when no staff or students are present on campus.

vi. Isolation areas have been designated. If used by a person who has been found to be ill, they will be closed off for 24 hours before being cleaned and disinfected by custodians provided with PPE.

### Plan for Adequate Outdoor Air Circulation

| Condition Met | Condition Assessed |
|---|---|
| Yes | In accordance with CDC guidance, ensure that ventilation systems and fans operate properly and increase circulation of outdoor air as much as possible by opening windows and doors and other methods. Do not open windows and doors if doing so poses a safety or health risk to children using the facility (for example, allowing pollen in or exacerbating asthma symptoms). Maximize central air filtration for heating, ventilation, and air conditioning (HVAC) systems (targeted filter rating of at least MERV 13). |

Ventilation systems are new (installed in 2018), high quality Lennox units that provide clean filtered outdoor air. Windows and doors are opened when conditions allow it. Each classroom and the office are equipped with air cleaners with HEPA filters that include internal UV lights to kill pathogens.

### Safe Water Systems and Features

| Condition Met | Condition Assessed |
|---|---|
| Not Applicable | Take steps to ensure that all water systems and features (e.g., drinking fountains, decorative fountains) are safe to use after a prolonged facility shutdown to minimize the risk of Legionnaires' disease and other diseases associated with water. |

Facility did not have a prolonged shutdown. Employees utilized the building during shelter in place orders with safety measures (physical distancing, face coverings, increased cleaning and disinfecting).

### Handling Student Belongings

| Condition Met | Condition Assessed |
|---|---|
| Yes | Keep each child's belongings separated and in an individually labeled storage container, cubby, or area. Send belongings home each day to be cleaned. |

Each child's belongings are stored separately and taken home daily for cleaning.

## Employee Issues

Engage employees on COVID-19 plans and provide necessary training and accommodations.

### Revisit existing bargaining agreement.

| Condition Met | Condition Assessed |
|---|---|
| Not Applicable | i. Engage the exclusive representatives of labor groups and work collaboratively in tailoring bargaining agreements to address the relevant employee issues in this checklist. Ideally, these are matters that would be resolved as part of the reopening planning process and prior to school starting so as to provide clarity for reopening.<br>ii. Create a plan for future bargaining that may be necessary as additional issues arise. |

Sherwood employees do not currently belong to labor groups, although they are free to organize if they wish to do so.

### Staffing Ratios

| Condition Met | Condition Assessed |
|---|---|
| Yes | i. Ensure staffing levels are sufficient to meet unique facility cleanliness, physical distancing, student learning, and health and safety needs to address COVID-19.<br>ii. Consider rolling staff cohorts to meet needs and avoid overwork. |

Physical distancing requirements are no longer in effect.

### Staff Training

| Condition Met | Condition Assessed |
|---|---|
| | Develo , and provide staff training or utilize state-provided training on:<br>i. Disinfecting frequency and tools and chemicals used in accordance with the Healthy Schools Act, CDPR guidance, and Cal/OSHA regulations. For staff who use hazardous chemicals for cleaning, specialized training is required.<br>ii. Physical distancing of staff and students. iii. Symptom screening, including temperature checks. iv. Updates to the Injury and Illness Prevention Program (IIPP). |

| | |
|---|---|
| | v. State and local health standards and recommendations, including, but not limited to, the<br>vii. following:<br>1. Proper use of protective equipment, including information on limitations of some face coverings that do not protect the wearer and are not PPE but can help protect people near the wearer. Face coverings do not replace the need for physical distancing and frequent handwashing. Cloth face coverings are most essential when physical distancing is not possible. Also include training on removal and washing of cloth face coverings.<br>2. Cough and sneeze etiquette.<br>3. Keeping one's hands away from one's face.<br>4. Frequent handwashing and proper technique.<br>5. Confidentiality around health recording and reporting. vi. Training for school health staff on clinical manifestations of COVID-19, pediatric presentations, and CDC transmissionbased precautions.<br>Training on trauma-informed practices and suicide prevention. |

i. Hazardous chemicals are not used. Disinfectants come from the approved list and are used according to instructions. PPE is provided for staff to use while cleaning, and training has been provided in staff meetings via remote and through SafeSchools online training.

ii. Training regarding physical distancing occurred before the school year and staff who were hired after the training date viewed recorded training. SafeSchool units on COVID-19 precautions also were required and covered physical distancing. Another training occurred after the beginning of the school year and before the school opened for inperson learning.

iii. Staff were trained on symptom screening, including temperature checks, before opening the site to in-person learning. Changes and adjustments were communicated via memos and email.

iv. Updates to the Injury and Illness Prevention Program (IIPP) were covered in the meeting before the school year and staff who were hired after the training date viewed recorded training.

v. State and local health standards and recommendations have been communicated to staff through the SafeSchools training, the beginning of the year training, and before school opened for in-person learning. As guidance changed, these changes were communicated in meetings and memos. Training on guidance included, but was not limited to: Proper use of protective equipment, including information on limitations of some face coverings that do not protect the wearer and are not PPE but can help protect people near the wearer
The fact that face coverings do not replace the need for physical distancing and frequent handwashing The use of cloth face coverings indoors.

Training on removal and washing of cloth face coverings has been communicated and shared with parents as well through school announcements
Cough and sneeze etiquette (catch in tissue or elbow)
Keeping one's hands away from one's face
Frequent handwashing and proper technique
Confidentiality around health recording and reporting

vi. Our school nurse is trained on clinical manifestations of COVID-19, pediatric presentations, and CDC transmission-based precautions.

vii. Training on trauma-informed practices and suicide prevention was been presented through SafeSchools and in the beginning of the year training. Additional training has been offered and communicated as it becomes available through our County Office of Education and other sources. A counselor has been added to the school staff.

### Staff Liaison

| Condition Met | Condition Assessed |
|---|---|
| Yes | Designate a staff liaison or liaisons to be responsible for responding to COVID-19 concerns. Employees should know who they are and how to contact them. |

The school director is the liaison and staff are aware of how to contact her.

### Reasonable Accommodations

| Condition Met | Condition Assessed |
|---|---|
| Yes | i. Protect and support staff who are at higher risk for severe illness (medical conditions that the CDC says may have increased risks) or who cannot safely distance from household contacts at higher risk by providing options such as telework or negotiated change in classification or duties.<br>ii. If reasonable accommodations are not practicable, the LEA should work with the employee to develop a flexible leave plan that endeavors to avoid exhausting the employee's earned leave. |

ii. A flexible leave plan will be explored if an employee cannot be reasonably accommodated.

## Communication

### Stakeholder Engagement

| Condition Met | Condition Assessed |
|---|---|
| Yes | School leaders should engage stakeholders, including families, staff, and labor partners in the school community, to formulate and implement the plans in this checklist. |

Reopening input was sought from stakeholders has been collected and recorded in the following formats:

- Minutes from teacher and staff meetings in which reopening with safety measures was discussed
- Announcements to Sherwood community, including teachers, staff, parents and students' family members in which reopening with safety measures was discussed and input was sought in the Back to School Survey
- Results of Back to School Survey
- Director's reports presented at open, public meetings in which reopening with safety measures was discussed
- Learning Continuity and Attendance Plan, presented at August 27th, 2021 board meeting, an open, public meeting
- Back to School Plan, presented to school community via Zoom on July 21, 2020, recording made available
- Four Town Halls for the 2021-2022 school year are planned
- Stakeholder input sought through the Community Surveys and LCAP process

**Communicating COVID-19-related Protocols**

| Condition Met | Condition Assessed |
|---|---|
| Yes | Communicate to staff, students, and parents about new, COVID-19-related protocols, including: i. Proper use of PPE/EPG. ii. Cleanliness and disinfection. iii. Transmission prevention. iv. Guidelines for families about when to keep students home from school. v. Systems for self-reporting symptoms. vi. Criteria and plan to close schools again for physical attendance of students. |

Communication to staff, students, and parents about new, COVID-19-related protocols are being handled through our school announcements via Parent Square, in memoranda from the school director to staff, and from the school nurse via Parent Square.

Communication includes: the proper use of PPE, how the school is handling cleanliness and disinfection, transmission prevention measures, guidelines for families about when to keep students home from school, how to report symptoms, any changes in the schedule for in-person learning, and the criteria for making these changes.

Protocols are changing frequently, so the school nurse is consulted when a novel situation occurs

**Communication for Vulnerable Members of the School Community**

| Condition Met | Condition Assessed |
|---|---|
| Yes | Target communication for vulnerable members of the school community. |

Communication is inclusive and addresses vulnerable members of the community as well as members of the community who do not identify as vulnerable.

**Communication Plan for Positive COVID-19 Case**

| Condition Met | Condition Assessed |
|---|---|
| Yes | Create a communications plan for if a school has a positive COVID-19 case.<br>i. Address the school's role in documenting, reporting, tracking, and tracing infections in coordination with public health officials.<br>ii. Notify staff and families immediately of any possible cases of COVID-19. Review legal responsibilities and privacy rights for communicating about cases of the virus.<br>iii. Provide guidance to parents, teachers, and staff reminding them of the importance of community physical distancing measures while a school is closed, including discouraging students or staff from gathering elsewhere.<br>iv. Provide information to parents regarding labor laws, Disability Insurance, Paid Family Leave, and Unemployment Insurance.<br>v. Advise sick staff members and children not to return until they have met CDC criteria to discontinue home isolation.<br>vi. Inform those who have had close contact with a person diagnosed with COVID-19 to stay home and self-monitor for symptoms and to follow CDC guidance if symptoms develop. If a person does not have symptoms follow appropriate CDC guidance for home isolation. |

The school contacts the local public health department to report any known positive COVID-19 cases. In consultation with health professionals, any exposures on campus will be identified and potentially exposed individuals will be contacted to advise isolation and/or testing. Individuals identifying information will be held in confidence. Procedures for reporting exposures in the workplace will be followed according to CalOSHA regulations. Staff or students who show symptoms or who have been exposed to a COVID-19 positive individual are currently being asked to isolate for 10 days or verify that they do not have the COVID-19 virus with a negative COVID test after 5 days of isolation.

SHERWOOD MONTESSORI

**SPECIAL MEETING NOTICE OF THE BOARD OF DIRECTORS**

Topic: Special Meeting BOD
Time: Mar 10, 2022 05:30 PM Pacific Time (US and Canada)

Join Zoom Meeting
https://csuchico.zoom.us/j/82541639803?pwd=VFUzOEtzMEVMbGd0Nnh6dHcyQkhyZz09

Meeting ID: 825 4163 9803
Passcode: 485278
One tap mobile
+16699006833,,82541639803#,,,,*485278# US (San Jose)
+13462487799,,82541639803#,,,,*485278# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)

Meeting ID: 825 4163 9803
Passcode: 485278
Find your local number: https://csuchico.zoom.us/u/kQ9sO6O6o

Date/Time: **Thursday, March 10, 2022 – 5:30 p.m.**

**AGENDA**

**A. CALL TO ORDER** (5:30 p.m.)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA**

None

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (5:35 p.m.)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

None

**E. REGULAR BUSINESS** (5:45)

**E.1 Approval of Contract**
Consider approval of a contract with P65 IT LLC for cabling.
**Action requested:** Approve contract.

**E.2 Adoption of Second Interim Budget**
Consider adopting the Second Interim Budget.
**Action Requested:** Adopt budget.

**G. FUTURE AGENDA ITEMS** (5:55)
The Board will be asked to discuss the 2022-2023 Local Control Accountability Plan (LCAP) and adopt the LCAP at a subsequent meeting before June 30. The Board will receive an update on Board Elections.

**H. ADJOURNMENT** (6:00)

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Cabling Contract**

**Date:** March 10, 2022

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**SUMMARY**

The Board will be asked to approve a contract for work to complete the cabling for our E-Rate project.

**DISCUSSION**

There was one proposal submitted for completing the work of installing the cabling for our E-Rate funded fiber optic internet. We have about $2,829 left in our E-Rate account, so the remainder, about $10,000, would need to be paid out of other funds. These costs could be covered by our grant money from COVID recovery programs. The hard deadline for accepting the proposal is March 22, 2022.

**ACTION REQUESTED**

Approve contract.

Attachment: E-Rate Category 2 Proposal for FY22 Form 470 #220015012

# FY22 SHERWOOD MONTESSORI - Cabling

## E-Rate Category 2 Proposal for FY22 Form 470 #220015012

**CLIENT**
SHERWOOD MONTESSORI
1071 E 16TH STREET
CHICO, CA 95928

**BEN**: 17011887
**FCC FRN**: 0026016923

**SERVICE PROVIDER**
P65 IT LLC
245 KENTUCKY ST STE A
PETALUMA, CA 94952
www.p65.org
**498 ID/SPIN**: 143050011 *(Form 473 certified)*
**FCC FRN**: 0026394379
**SPI INVOICING:** YES (*BEAR upon request*)

P65 IT LLC is a Sonoma County business focusing on K12, with extensive E-Rate and Network Project experience, providing conception, design, configuration, deployment, and ongoing maintenance support. With a specialized staff size of 13, we've participated and delivered E-Rate C2 projects in 2017, 2018, 2019, 2020, 2021 and now in 2022. Before starting P65 IT LLC I participated in many e-rate C1 and C2 projects from the county and school's perspective while serving as a Network Administrator at Sonoma COE, and as an IT Coordinator for a district. We understand what you need as a school district.

*"I wanted to thank you for the excellent*
*work of your team. That was by far the fastest and best*
*execution of installation I have been a part of."*
- **Larry Black, Directory of Technology, lblack@calistogajusd.org**
$77,204.12 E-Rate Category 2 Project FY2019

You will find the following sections:


**SCOPE OF WORK** 2

**PRICING** 3

**SCHEDULE** 6

**WARRANTY & SUPPORT** 6

**REFERENCES** 7

**SIGNATURES** 8


Contact any or all of us with questions, comments, or selections. Per the notices of the FCC and USAC we keep our proposals short and clear.


P65 IT LLC Exec
Andre Soileau
ars@p65.org
(707) 782-4211

**E-Rate Specialist**
**Kacy Ruttledge**
**ktr@p65.org**
**(707) 536-6737**

Operations Manager
Tyler Van Deren
tvd@p65.org
(707) 782-4213

**SCOPE OF WORK**

**Fiber**

- P65 IT LLC will install 6-strand OS2 single-mode fiber to all IDF locations to the MDF location.
- P65 IT LLC will provide labeled termination boxes accommodating all new runs.
- All new runs will meet or exceed current industry standard certifications for single-mode fiber optic data cabling.
- All fiber segments will home run directly to the MDF. If a complete home run is not feasible due to prohibitions of pathway or cost, client and contractor will agree upon an alternative before work begins.
- P65 IT LLC will terminate all terminated fiber strands to LC connectors at both terminals.
- P65 IT LLC will cross over all terminated fiber strands at the MDF side.

**Copper**

- all copper cable runs will use solid copper Category 6 UTP.
- P65 IT LLC will use (OSP) cabling as needed for outdoor applications.
- P65 IT LLC will only use cable with solid copper conductors.
- P65 IT LLC will terminate all copper runs to EIA/TIA 568B standard on both terminals.
- All new copper runs will home run directly to the nearest IDF/MDF location,
- P65 IT LLC will label each run on both terminals with label tape (not hand-written).
- P65 IT LLC will certify all new runs to current industry standards for copper data wiring, not less than Category 6 specifications.

**Equipment**

- P65 IT LLC will install district supplied (1) Switch for each (3) portable building on campus
- P65 IT LLC will install district supplied (1) Wireless access point for each (3) portable building on campus
- P65 IT will install (1) fiber housing for each (3) portable building on campus

**Optionals (as expressed by Tech during Site Walk)**

Option A

- P65 IT LLC will Trench between portable buildings and run conduit for fiber pathway

Option B

- P65 It LLC will install (11) additional switches as specified by the Tech during the site walk.
- Install only, does not include configuration or support.

**PRICING**

IF SELECTING THIS PROPOSAL, NOTIFY ktr@p65.org and bids@p65.org FOR A SERVICE AGREEMENT TO BE SENT OVER FOR SIGNING.

| PRICING TABLE | SUBTOTAL | SALES TAX | TOTAL | CONTINGENCY 10% |
|---|---|---|---|---|
| Fiber, copper, Equipment install | $12,895.85 | $96.55 | $12,992.40 | $1,200.00 |
| **Optional A)** Trenching between buildings and running conduit for fiber pathway | $2,351.60 | $17.40 | $2,369.00 | $230.00 |
| **Optional B )** install of additional (11) district supplied switches | $5,726.30 | N/A | $5,726.30 | $500.00 |

*Pricing for primary scope of work found on **page 4**

*Pricing for optionals found on **page 5**

| SHERWOOD MONTESSORI Fiber, Copper, and Equipment Install | | | | | | | SUBTOTAL | SALES TAX | TOTAL |
|---|---|---|---|---|---|---|---|---|---|
| PRICING TABLE | | | | | | | $ 12,895.85 | $ 96.55 | $ 12,992.40 |
| **Type** | **Make** | **Part** | **Desc.** | **Qty** | **Tax Rate** | **Price Per** | **Line Subtotal** | **Sales Tax** | **Line Total** |
| Cabling | LibAV | 24-4P-P-L6-EN | Cat6 by ft (U/UTP, Plenum) | 150 | 7.250% | $ 0.40 | $ 59.40 | $ 4.31 | $ 63.71 |
| Cabling | | | Plug Cat6 | 6 | 7.250% | $ 0.06 | $ 0.36 | $ 0.03 | $ 0.39 |
| Cabling | | | 1/2" plastic conduit tubing | 100 | 7.250% | $ 0.38 | $ 38.40 | $ 2.78 | $ 41.18 |
| Fiber | Cleerline | 6RMD9125OS2R | 6 strand rugged fiber OS2 | 400 | 7.250% | $ 0.96 | $ 384.00 | $ 27.84 | $ 411.84 |
| Fiber | Cleerline | SSF-LC-SMUPC | Plug (LC/UPC, single-mode fiber) | 24 | 7.250% | $ 13.20 | $ 316.80 | $ 22.97 | $ 339.77 |
| Fiber | Cleerline | FAN0625M250 | Fan out kit (6-strand fiber, 900um, 25-inch) | 4 | 7.250% | $ 20.40 | $ 81.60 | $ 5.92 | $ 87.52 |
| Fiber | FS | FHD-FWME2 | Wall Mount Enclosure | 3 | 7.250% | $ 99.60 | $ 298.80 | $ 21.66 | $ 320.46 |
| Rack | Monoprice | 10671 | Wall mount vertical rack 4U | 1 | 7.250% | $ 107.39 | $ 107.39 | $ 7.79 | $ 115.17 |
| Materials | P65 | P65-Materials | Misc. materials (conduit, fittings, and more) | 1 | 7.250% | $ 45.00 | $ 45.00 | $ 3.26 | $ 48.26 |
| Labor | P65 | P65-LABOR-D | Labor Distant Project | 3 | | $ 240.00 | $ 720.00 | $ - | $ 720.00 |
| Labor | P65 | P65-LABOR-I | Labor Internal | 9 | | $ 128.50 | $ 1,156.50 | $ - | $ 1,156.50 |
| Labor | P65 | P65-LABOR-S | Labor ARCWORK LLC | 72 | | $ 134.55 | $ 9,687.60 | $ - | $ 9,687.60 |

| Optional A) Trenching/Running Conduit | | | | | | | SUBTOTAL | SALES TAX | TOTAL |
|---|---|---|---|---|---|---|---|---|---|
| PRICING TABLE | | | | | | | $ 2,351.60 | $ 17.40 | $ 2,369.00 |
| **Type** | **Make** | **Part** | **Desc.** | **Qty** | **Tax Rate** | **Price Per** | **Line Subtotal** | **Sales Tax** | **Line Total** |
| Materials | P65 | P65-Materials | Misc. materials (conduit, fittings, and more) | 1 | 7.250% | $ 240.00 | $ 240.00 | $ 17.40 | $ 257.40 |
| Labor | P65 | P65-LABOR-D | Labor Distant Project | 1 | | $ 240.00 | $ 240.00 | $ - | $ 240.00 |
| Labor | P65 | P65-LABOR-I | Labor Internal | 2 | | $ 128.50 | $ 257.00 | $ - | $ 257.00 |
| Labor | P65 | P65-LABOR-S | Labor ARCWORK LLC | 12 | | $ 134.55 | $ 1,614.60 | $ - | $ 1,614.60 |

| Optional B, Additional Switch Install) | | | | | | | SUBTOTAL | SALES TAX | TOTAL |
|---|---|---|---|---|---|---|---|---|---|
| PRICING TABLE | | | | | | | $ 5,726.30 | $ - | $ 5,726.30 |
| **Type** | **Make** | **Part** | **Desc.** | **Qty** | **Tax Rate** | **Price Per** | **Line Subtotal** | **Sales Tax** | **Line Total** |
| Labor | P65 | P65-LABOR-D | Labor Distant Project | 1 | | $ 240.00 | $ 240.00 | $ - | $ 240.00 |
| Labor | P65 | P65-LABOR-I | Labor Internal | 5 | | $ 128.50 | $ 642.50 | $ - | $ 642.50 |
| Labor | P65 | P65-LABOR-S | Labor ARCWORK LLC | 36 | | $ 134.55 | $ 4,843.80 | $ - | $ 4,843.80 |

UBIQUITI PRODUCTS

P65 IT LLC is a top 10 leader of Ubiquiti sales in the K12 space, Ubiquiti as a manufacturer provides limited support and warranty at 1 years. P65 IT LLC pricing on Ubiquiti extends their 1 year warranty to 3 years , adding an additional 2 year warranty. **Ubiquiti equipment includes controller software and licensing at no additional cost.**

| Ubiquiti Warranty & Support | Time | Price |
|---|---|---|
| Manufacturer | 1 year | Included |
| P65 IT LLC | 2,3 years | Included |
| P65 IT LLC | 4 years | + 10% from price listed |
| P65 IT LLC | 5 years | + 20% from price listed |

**SCHEDULE**

Our project availability calendar will be made available after receiving a Funding Commitment Decision Letter (FCDL) from USAC. As a business focused on Projects, we're able to schedule a time that works well for you to complete the installation, and will provide a checklist of actions to ensure the project goes smoothly, ontime, and you are delivered what you expected.

**WARRANTY & SUPPORT**

SERVICE PROVIDER may from time to time provide certain products and other items for which SERVICE PROVIDER is entitled to warranties and indemnities from the manufacturers, lessors, or licensors of such items. SERVICE PROVIDER shall pass through to CLIENT the benefits of such warranties and indemnities to the extent that SERVICE PROVIDER is able pursuant to any agreements between SERVICE PROVIDER and such manufacturers, lessors or licensors, and enforce such warranties and indemnities as directed by CLIENT.

## REFERENCES

***The majority of our quarterly survey's score 10/10;*** *Ask them why.*

| | |
|---|---|
| Bellevue Union School District<br>(707) 542-5197 | Ryan Green, IT Director rgreen@busd.org<br>*NETWORK PROJECTS, WIRELESS, VOICE* |
| Community Action Marin<br>(415) 526-7500 | Russell Farnell, CFO rfarnell@camarin.org<br>*NETWORK PROJECTS, WIRELESS, VOICE* |
| Community Action Partnership of Sonoma County<br>(707) 544-6911 | Susan Cooper, Executive Director scooper@capsonoma.org<br>*NETWORK PROJECTS, WIRELESS, VOICE* |
| Green Acre Homes & Schools<br>707-823-8722 | Rich Aguirre, Operations Mgr raguirre@greenacrehomes.org<br>*NETWORK PROJECTS, WIRELESS* |
| Guerneville School District<br>707-869-2864 x141 | Anita Jennings, IT Director ajennings@guernevilleschool.org<br>*NETWORK PROJECTS, WIRELESS* |
| Harmony Union School District<br>707-874-1205 | Stacy Kalember, Business Mgr skalember@harmonyusd.org<br>*NETWORK PROJECTS* |
| Kid Street Charter School<br>707-525-9223 | Kathleen Mallamo, Director kathleenm@kstreet.org<br>*NETWORK PROJECTS, WIRELESS* |
| Leggett Valley Unified School District<br>707-986-7131 | Garth Epling, IT garth@leggett.k12.ca.us<br>*NETWORK PROJECTS, WIRELESS, VOICE* |
| Oak Grove Unified School District<br>707-545-0171 | Mark Tong, IT mark@silyco.com<br>*NETWORK PROJECTS, WIRELESS, VOICE* |
| Old Adobe Union School District<br>(707) 765-4321 | Sloan Van Dam, Director of IT svandam@oldadobe.org<br>*NETWORK PROJECTS, WIRELESS, VOICE* |
| Pathways Charter School<br>(707) 585-6510 | Sara Jordan, Director sara.jordan@pathwayscharter.org<br>Brenda Peterson, IT brenda.peterson@pathwayscharter.org<br>*NETWORK PROJECTS, WIRELESS, VOICE* |
| Old Adobe Union School District<br>(707) 765-4321 | Sloan Van Dam, Director of IT svandam@oldadobe.org<br>*NETWORK PROJECTS, WIRELESS, VOICE* |
| Wright Elementary School District<br>(707) 542-0550 | Adam Schaible, Superintendent aschaible@wrightesd.org<br>*NETWORK PROJECTS, VOICE* |

**SIGNATURES**

This serves as a non-binding Letter of Intent ("LOI"). Please return to support@p65.org for P65 IT LLC to provide a Master Service Agreement.

**CLIENT**:

POST ADDRESS:

ELECTRONIC ADDRESS (E-MAIL):

TITLE:

NAME:

SIGNATURE:

DATE:

---

**SERVICE PROVIDER**: P65 IT LLC

POST ADDRESS: 245 KENTUCKY ST STE A

ELECTRONIC ADDRESS (E-MAIL): support@p65.org

TITLE:

NAME:

SIGNATURE:

DATE:

| 2021-22 | FUNDING AT 100 ADA | FUNDING AT 100 ADA | | | |
|---|---|---|---|---|---|
| **2021-22 2ND INTERIM** | **2021-22 1st INTERIM BUDGET** | **2021-22 2ND INTERIM BUDGET** | **CHANGE** | | |
| **Revenue** | | | | | |
| 8011 Local Control Funding | 463,442 | 445,667 | | | |
| 8012 Education Protection Act | 179,156 | 250,455 | | | |
| 8096 In Lieu Taxes | 358,906 | 261,945 | | | |
| Subtotal LCFF Revenues | ***1,001,504*** | ***958,067*** | ***(43,437)*** | | |
| 8290 - ELO/IPI 20/21-21/22 | 74,000 | 74,000 | - | | |
| 8290 - ELOP 21-22 | 50,000 | | (50,000) | | |
| 8290 - ESSER II-3212 | | 28,511 | | | |
| 8290 - ESSER III-3213 | | 50,091 | | | |
| 8290 - ESSER III-3214 | | 12,523 | | | |
| 80XX - ESSER | 100,000 | 91,125 | (8,875) | | |
| 8181 Spec. Educ.- SELPA Fed | 6,000 | 6,000 | - | | |
| 8311 Spec. Educ. - SELPA State | 95,000 | 95,000 | - | | |
| 8312 Spec. Educ. - SELPA ERMHS | 3,000 | 3,000 | - | | |
| 8550 Mandates Block Grant | 2,500 | 2,500 | - | | |
| 8560 State Lottery | 35,000 | 30,000 | (5,000) | | |
| 8590 - Educator Effectiveness-6266 | 44,934 | 44,934 | - | | |
| 8290 - ELOP 21-22 - 2600 | | 50,000 | 50,000 | | |
| 8699 Other Local Revenue | | 3,000 | 3,000 | | |
| **TOTAL REVENUES** | **1,411,938** | **1,357,626** | ***(54,312)*** | | |
| **Expense** | | | | | |
| 1000 Certificated Salaries | 562,694 | 562,694 | - | | 32% |
| 2000 Classified Salaries | 455,654 | 478,103 | 22,449 | | 27% |
| 3000 Employee Benefits | 300,335 | 309,907 | 9,572 | | 18% |
| **SUBTOTAL** | ***1,318,683*** | ***1,350,704*** | 32,021 | | 77% |
| 4100 Texts and Core Curricula | 12,000 | 12,000 | - | | |
| 4200 Reference Materials | 3,000 | 3,000 | - | | |
| 4300 Materials and Supplies | 50,000 | 60,000 | 10,000 | | |
| 4400 NonCap Equipment | 4,000 | 4,000 | - | | |
| 4700 Food (Nutrition) | 500 | 500 | - | | |
| **SUBTOTAL** | ***69,500*** | ***79,500*** | 10,000 | | 5% |
| 5200 Travel and Conferences | 5,000 | 2,000 | (3,000) | | |
| 5300 Dues and Memberships | 3,100 | 3,100 | - | | |
| 5400 Property/Liability Insurance | 31,000 | 31,000 | - | | |
| 5500 Operations / Housekeeping | 67,000 | 80,000 | 13,000 | | |
| 5600 Rentals, Leases, and Repairs | 12,600 | 13,000 | 400 | | |
| 5800 Prof. & Consulting Services | 120,000 | 160,000 | 40,000 | | 4% |
| 5900 Communications | 25,000 | 25,000 | - | | |
| **SUBTOTAL** | ***263,700*** | ***314,100*** | 50,400 | | 18% |
| 6200 CAPITAL OUTLAY- BLDG | | | - | | |
| **TOTAL EXPENDITURES** | **1,651,883** | **1,744,304** | **92,421** | | 100% |
| **Net Income** | ***(239,945)*** | ***(386,678)*** | **ADA Equiv.** | | **-39** |
| **Restricted Grant Funds** | ***50,000*** | ***104,757*** | | | |
| **Unassigned/Unappropriated - Prior Year** | **354,855** | **550,000** | | | |
| **Unassigned/Unappropriated - Proj. Yr End** | **114,910** | **58,565** | **ADA Equiv.** | | **6** |
| **Reserve - Economic Uncertainties** | **220,000** | **220,000** | **Est. 2 mos. salary/benes.** | | |
| **Total - Unassigned/Economic Uncertainty** | **334,910** | **278,565** | **ADA Equiv.** | | **28** |

# SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, March 24, 2022 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00 p.m.)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA** (6:05 p.m.)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, February 17, 2021 and Special Meeting, March 10, 2022.

**B.2 Approval of Auditor Proposal** Consider approval of proposal of service for annual financial audit for three years.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6:20)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 School Director Report**
**E.2.2 Treasurer Report**
**E.2.3 SMPO Report**
**E.2.4 Chair Report**

**E.3 Action Items** (6:35)

**E.3.1 Community Surveys** The Board will be asked to give input regarding the Community Surveys and Student Surveys that will generate valuable data for school improvement.
**Action Requested:** Discuss community surveys.

**E.3.2 Elections** The Board will have a discussion of anticipated school needs with the goal of strategic recruitment of candidates for the Sherwood Board of Directors.
**Action Requested:** Discuss elections.

**E.3.3 Parsec Education Service Agreement** Consider approval of contract for services from Parsec Education.
**Action Requested:** Approve contract.

**F. CLOSED SESSION** (6:55)

**F.1 Public Employee Performance Evaluation**

With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director.

**G. FUTURE AGENDA ITEMS** (7:10)

The Board will be asked to discuss the 2022-2023 Local Control Accountability Plan (LCAP) and adopt the LCAP at a subsequent meeting before June 30. The Board will receive an update on Board Elections.

**H. ADJOURNMENT** (7:15)

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, February 17, 2022 – 6:00 p.m.**

**AGENDA**

**A. CALL TO ORDER** (6:00 p.m.)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*Meeting was called to order by Russell Shapiro; Russell Shapiro, Dan LaBar, Robyn Howley present.*

**B. CONSENT AGENDA** (6:05 p.m.)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, January 20, 2021.

**B.2 Audit Acceptance** Our auditor has prepared the fiscal audit for 2020-2021 for the Board's acceptance.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

*Consent agenda items were reviewed, Dan LaBar motioned for approval, Russell Shapiro seconded. Approved by all board members present (Russell Shapiro, Dan LaBar, and Robyn Howley). Karey Cooper arrived late and was notified of board approval of consent minutes.*

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6:20)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**
**E.2.5 Chair Report**

*Michelle Yezbick presented Instructional Staff Report and School Director Report, Pat Casey presented Treasurer Report, Russell Shapiro presented SMPO Report and Chair Report. Discussion followed. The Board directed Michelle Yezbick to discuss concerns raised by teachers and the Board of Directors regarding the condition of the bathrooms at Sherwood with Chico Unified School District.*

**E.3 Action Items** (6:45)

**E.3.1 Supplement Annual Update** The Board will be presented with an update to the LCAP that takes into account additional funding from the 2021 Budget Act.
**Action Requested:** Receive report.

*Michelle Yezbick presented Supplemental Annual Update. Discussion followed. No board approval required.*

**E.3.2 Comprehensive School Safety Plan** The Board will be asked to approve the updated Safety Plan for 2022-2023.
**Action Requested:** Adopt plan.

*Russell Shapiro discussed Comprehensive School Safety Plan. Discussion followed. Karry Cooper motioned for approval, Russell Shapiro seconded, safety plan approved by Russell Shapiro, Dan LaBar, Karey Cooper and Robyn Howley.*

**E.3.3 School Plan for Safe Reopening** The Board will be asked to approve the updated School Plan for Safe Reopening now titled School Plan for Safe Operations During COVID-19 Pandemic.
**Action Requested:** Approve plan.

*Russell Shapiro discussed School Plan for Safe Reopening. Discussion followed. Karey Cooper motioned for approval, Robyn Howley seconded, plan approved by Russell Shapiro, Dan LaBar, Karey Cooper and Robyn Howley.*

**F. CLOSED SESSION** (7:15)

**F.1 Public Employee Performance Evaluation**

With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director.

*At 7:24 pm the board moved to a closed session. Recording stopped.*

**G. FUTURE AGENDA ITEMS** (7:30)

The Board will be asked to discuss the 2022-2023 Local Control Accountability Plan (LCAP) and adopt the LCAP at a subsequent meeting before June 30. The Board will receive an update on Board Elections.

**H. ADJOURNMENT** (7:45)

*Russell Shapiro adjourned Board meeting at 7:51 pm.*

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SHERWOOD MONTESSORI

**SPECIAL MEETING MINUTES OF THE BOARD OF DIRECTORS**

Topic: Special Meeting BOD
Time: Mar 10, 2022 05:30 PM Pacific Time (US and Canada)

Join Zoom Meeting
https://csuchico.zoom.us/j/82541639803?pwd=VFUzOEtzMEVMbGd0Nnh6dHcyQkhyZz09

Meeting ID: 825 4163 9803
Passcode: 485278
One tap mobile
+16699006833,,82541639803#,,,,*485278# US (San Jose)
+13462487799,,82541639803#,,,,*485278# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)

Meeting ID: 825 4163 9803
Passcode: 485278
Find your local number: https://csuchico.zoom.us/u/kQ9sO6O6o

Date/Time: **Thursday, March 10, 2022 – 5:30 p.m.**

**MINUTES**

**A. CALL TO ORDER**

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*Russell Shapiro called the meeting to order at 5:32PM, Russell Shapiro, Beth Hammer and Robyn Howley were present.*

**B. CONSENT AGENDA**

None

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA**

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

None

**E. REGULAR BUSINESS**

**E.1 Approval of Contract**
Consider approval of a contract with P65 IT LLC for cabling.
**Action requested:** Approve contract.

*Russell Shapiro reviewed contract with P65 IT LLC for cabling. Discussion followed. Beth Hammer motioned for approval, Robyn Howley seconded with full approval from present Board members.*

**E.2 Adoption of Second Interim Budget**
Consider adopting the Second Interim Budget.
**Action Requested:** Adopt budget.

*Pat Casey presented Second Interim Budget. Discussion followed. Robyn Howley Motioned for approval, Beth Hammer seconded with full approval from present Board members.*

**G. FUTURE AGENDA ITEMS**

The Board will be asked to discuss the 2022-2023 Local Control Accountability Plan (LCAP) and adopt the LCAP at a subsequent meeting before June 30. The Board will receive an update on Board Elections.

**H. ADJOURNMENT**

*Meeting adjourned by Russell Shapiro at 5:42PM.*

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Auditor Selection**

**Date:** March 24, 2022

---

**SUMMARY**

The Board needs to retain an auditor to complete the annual financial audits for upcoming years.

**DISCUSSION**

Sherwood has worked with HM&S in the past; they are familiar with us and we with them. This familarity helps to expedite the work, and assures us that the work will be done with quality. Pat Casey, our Business Manager, has recommended that we approve a contract with HM&S. The quote given includes the cost of three years:

2022-23 $ 10,100
2023-24 $ 10,500
2024-25 $ 10,900

The proposal also includes a cost for preparing our taxes at $1,600 each year.

There is a stipulation in the proposal that if inflation exceeds 4% in any of the contract years, the firm can increase the fee. At that point, the school can elect to cancel the contract.

**ACTION REQUESTED**

Approve the selection of HM&S as Sherwood's auditor for the next three years.

**Attachment:** Auditor Fee Proposal

# Proposal for Independent Audit Services

Years Ending June 30, 2022, 2023, and 2024

Prepared by Joy L. McNulty, CPA, Partner
55 Independence Circle, Suite 102
Chico, CA 95973
530.588.7427 x308

HORTON MCNULTY & SAETEURN, LLP

March 17, 2022

Ms. Michelle Yezbick
Sherwood Montessori
1010 Cleveland Avenue
Chico, CA 95928

Dear Michelle:

The partners and staff of Horton McNulty & Saeteurn, LLP (HM&S), would like to express our appreciation to you and your staff for the effort and cooperation during our recent audit of Sherwood Montessori (the Charter School), and for your interest in continuing your professional services with HM&S. We are confident that HM&S can provide the quality services you seek at a reasonable cost.

One of our core business practices is to align our firm with clients that share our high standards for quality and ethics in the workplace, and we know the Charter School is just that. Outlined below and throughout our proposal, we will demonstrate why HM&S is the right choice for you.

## Who We Are

At Horton McNulty & Saeteurn, LLP (HM&S), the value of service begins with a focus on our clients. We constantly look for ways to impart value in the services we provide. We leverage the strength of our people, and are proactive in identifying issues and opportunities affecting our clients. Like you, we know that we are in a business where communication, relationships, and understanding common goals are essential to our success and the success of our clients.

Our philosophy has always been to provide the finest auditing, accounting, tax, and management advisory services that are available in the communities we serve; to be associated with clients who wish to reach their maximum potential; and to be a firm that is enjoyable to work for and rewarding to work with. Our goals are to contribute to the community and the profession to which we belong and to grow, but never to lose the personal relationship with clients who are the foundation of our practice.

We are organized to provide a full range of accounting, auditing, tax, management consulting, and related services. We are committed to excellence of service; we take a constructive approach and maintain uniformly high standards of quality and responsibility in every area of our practice. We have industry experts within our firm available to deal with specific problems. Every engagement we undertake is under the personal direction of a partner of the firm. We continue to be concerned with the development of new approaches and techniques, all directed toward rendering the highest quality services at a reasonable cost.

Our quality control system meets the independence requirements of the Standards for *Audits of Governmental Organizations, Programs, Activities and Functions*, published by the United States General Accounting Office. We meet all specific requirements imposed by state or local law or rules and regulations. We follow the American Institute of Certified Public Accountants', *Interpretation 501-3, Failure to Follow Standards and/or Procedures or Other Requirements in Governmental Audits.*

## Service

We would like to emphasize our commitment to maintaining professional staff continuity in servicing this engagement. Many of our clients rely on having the same resources available to them because it reflects a commitment to their organizations and a deeper understanding of what their organizations are trying to achieve. Our staff builds relationships based upon integrity, trust, and mutual respect, which is a primary reason that we maintain long-term professional relationships.

At HM&S, we understand that your audit will only be as effective as the people performing the task, which is the reason our partners play such a significant role in our engagements. We work closely with our clients and are highly involved in all phases of the audit, from planning and preparation through fieldwork and financial reporting.

Our approach is management-oriented, and our engagements are professionally staffed. We concentrate on maintaining a close and constructive relationship with our clients at all times and on being responsive to their needs throughout the engagement. We also stress the importance of utilizing the Charter School's personnel to the extent possible as a means of reducing costs and as a basis for transferring skills to the Charter School. Our staff is composed of many individuals who have helped train and supervise our entry-level staff so that our approach is technically competent, and at the same time responsive to clients' unique accounting and reporting situations.

As experts in traditional services to LEAs, we provide:

- Worry-free financial reporting.
- Compliance for your peace of mind.
- Audit tools (such as an electronic portal), early planning, and open communication with the Charter School to ensure the ease of audit completion and to minimize the interruption of the Charter School's normal operations.

## Technical Expertise

When working with us, you will have two knowledgeable primary points of contact to ensure you always have immediate access to the resources you need. All licensed professional staff are required to receive a certain number of continuing professional education hours in various disciplines each year and certification period. It is our job to bring the right resources to the Charter School, rather than your team having to determine who they should call with a question.

We subscribe to several professional and educational services that provide daily and weekly updates. Regular updates are provided to all professional staff via email, in-house technical training sessions and self-selected continuing professional education (CPE).

We are proactive in communicating applicable proposed accounting standards changes to clients. We want to make sure we are sharing the information that is most pertinent to your business, rather than flooding you with every bit of information available.

## Rotation of Auditors – *California Education Code*, Section 41020 (f)(2)

Our size allows for a rotation of auditors periodically so that the audits are continually evaluated by accountants with fresh and skeptical eyes. HM&S's school auditing team includes two partners with extensive experience auditing school districts, charter schools, and county offices of education. This provides for the rotation of auditors in accordance with *California Education Code*, Section 41020(f)(2), whereby the lead audit partner having primary responsibility for the audits can be rotated within our firm at least once every six years.

## Audit Work to be Completed

The audits will be conducted in accordance with auditing standards generally accepted in the United States of America; *Government Auditing Standards*, issued by the Comptroller General of the United States; and the *Guide for Annual Audits of California K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel.

**Audit Timeline**

| Audit Schedule | Proposed Timing | Location |
|---|---|---|
| FIELDWORK<br>Permanent file information<br>Internal control understanding<br>Board minutes<br>Attendance accounting<br>State compliance<br>Complete account analysis:<br>Cash<br>Accounts receivable<br>Prepaid expenses<br>Capital assets<br>Accounts payable<br>Long-term debt<br>Advances from grantors<br>Revenue and other<br>Finalize analytical review<br>Review | October | On-site |
| AUDIT COMPLETION PHASE<br>Report preparation<br>Submit draft for management review<br>Deliver final report | November/<br>December | Work completed from HM&S office |

## Fee Proposal

We provide a value proposition that brings a quality audit with certainty in price. We believe our rates are comparable to those of other accounting firms. However, we believe that our service approach and techniques provide a unique capability to achieve cost savings while maintaining the highest quality standards.

We seek to reward client loyalty and pass on the savings gained from the continuity of long-term relationships with our clients. The following worry-free reporting fees reflect a discount for the Charter School's commitment to a multi-year agreement. Our fees, including travel expenses, will not exceed the following:

| Services | 06/30/22 | 06/30/23 | 06/30/24 |
|---|---|---|---|
| Audit of financial statements | $ 10,100 | $ 10,500* | $ 10,900* |
| Federal and state information returns | $ 1,600 | $ 1,600* | $ 1,600* |

**While we understand that guaranteed fees are important to the Charter School's budgeting decisions, with the continuing concern of rising inflation, we are doing something we have never done before. Due to the uncertainty surrounding the outlook on inflation, in the event that annual inflation should exceed 4% (as measured by the U.S. Bureau of Labor Statistics 12-month—all items November reading), we reserve the option to notify the Charter School of an inflation-adjusted contract fee prior to January 31 of the fiscal year under audit. If the Charter School does not accept the inflation-adjusted fee, the Charter School may choose to discontinue the contract.*

Our fees are based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. We understand that you will provide us with all financial records and related information required for our audit and that you are responsible for the accuracy and completeness of that information. All audit requirements included in the July 1, 2021, audit guide issued by the Education Audit Appeals Panel, *Guide for Annual Audits of California K-12 Local Education Agencies and State Compliance Reporting*, have been incorporated in the fees listed. In the event that any additional services may be requested by the Charter School or required by the *Guide for Annual Audits of California K-12 Local Education Agencies and State Compliance Reportin*g, issued by the Education Audit Appeals Panel subsequent to July 1, 2021, those services will be billed to the Charter School at $205 per hour for 2021-22, $215 per hour for 2022-23, and $225 per hour for 2023-24.

The above fees do not include the presentation of the audit report at the Charter School's board meeting or the audit committee meeting. Should you desire such a presentation, you will be obligated to compensate us at the above rates for the time to prepare for and attend the board meeting and/or audit committee meeting. Travel time will be charged at $100 per hour. You will also be obligated to reimburse us for any travel expenses.

**Unlimited Access Provision**

In addition, HM&S provides unlimited access to the intellectual capital of our firm. This access enables you to regularly exchange ideas—by phone, email, or in meetings, at no additional cost to you. However, should such consultation require additional work or research, you would be obligated to compensate us at our standard hourly rates. We will be sure to discuss additional fees with you before performing the additional work or research. Our standard hourly rates, which are adjusted annually in January, are currently as follows: Partner $275; Manager $200; Senior $185.

We appreciate the opportunity to present our professional qualifications to you, and we will be pleased to provide any additional information you require.

Very truly yours,

Horton McNulty & Saeteurn, LLP



Joy L. McNulty, CPA, Partner
*Email: joy.mcnulty@hms-cpas.com*

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** March 24, 2022

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**Administrative**

- Updated enrollment will be reported at the meeting.
- CUSD facilities representatives have visited the campus to inspect the restroom facilities. They will be installing an additional urinal and sink in the boys' restroom and repairing and replacing ceiling and floor materials over the summer. It was determined that the restrooms are safe to use but need repairs for upkeep.
- Teachers attended the second of two trainings on *Moving Montessori Math Forward.* The intended outcome of the training is to lift the level of rigor in the traditional Montessori curriculum.
- The PBIS (Positive Behavior Intervention and Supports) team has planned a celebration for students in grades 1-3 who are making good choices. One Friday, there will be a Lower Elementary Dance Party with guest DJ Orchard Station, a.k.a. Eric Parish. Eric was a teacher at Sherwood for 11 years and the kids are very excited to see him again.
- Kids in grades 4-8 are learning Haitian Dance in weekly classes. The science/art room also works well as a dance studio with tables moved to the edges!
- Teachers have completed the work of choosing Essential Standards in math and English language arts. Next steps in our schoolwide effort to focus instruction will be to revise report cards and identify which Star Renaissance Assessment items are in alignment with the chosen standards.
- We have been conducting school tours for parents interested in enrolling in the school. These have been going well and it is a pleasure to show off our program.
- My administrative assistant, Heather Fisher, and I are working to prioritize observations on my calendar. We are cutting back on the number of meetings I have to make room for in-person observations.

**Safety**

- On Monday, March 21st, students and staff were allowed to make the choice to wear or not wear face coverings. We continue to provide masks for staff and students who want to wear them.

**Legislative/Legal/Compliance**

- Pat and I continue to work with our consultant to fulfill compliance work related to state and federal funds. Most recently, reporting for the Title One Consolidated Application was completed.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Treasurer's Report**

**Date:** March 24, 2022 Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of February 2022 reconciled with and matched those of the school's internal reports. The New Balance totaled $ 934,321.97 as of February 28, 2022 for the checking account and $50,000 in the special account which will moved back to the checking account once the contract work at 1010 Cleveland is signed off by the county.
- There were no unexpected high-cost expenses in February.

Profit & Loss

- The February Profit & Loss report shows a Net Income of -$71,328 which is offset by February LCF funds totaling $61,595 deposited in March along with Grant funds of $12,732.

Cash Flow

- Assuming all Federally allocated funds are received and P1 is at least 100 ADA, the school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Balance Sheet
**Accrual Basis** — As of February 28, 2022

| | Feb 28, 22 |
|---|---|
| **ASSETS** | |
| **Current Assets** | |
| **Checking/Savings** | |
| **9100-Assets** | 890,585 |
| **Total Checking/Savings** | 890,585 |
| **Accounts Receivable** | |
| **9200-Accounts Receivable** | 16,015 |
| **Total Accounts Receivable** | 16,015 |
| **Other Current Assets** | |
| **9290 - Due from Grantor Govts.** | -54,246 |
| **9340-Security Deposit** | 50,000 |
| **Total Other Current Assets** | -4,246 |
| **Total Current Assets** | 902,354 |
| **Fixed Assets** | |
| **9410 - Land** | 95,000 |
| **9430- Building** | 182,515 |
| **9435-Accumulated Depreciation** | -21,786 |
| **Total Fixed Assets** | 255,729 |
| **TOTAL ASSETS** | **1,158,083** |
| **LIABILITIES & EQUITY** | |
| **Liabilities** | |
| **Current Liabilities** | |
| **Credit Cards** | |
| **SHERWOOD COSTCO VISA** | 4,333 |
| **Total Credit Cards** | 4,333 |
| **Other Current Liabilities** | |
| **9500-Liabilities** | 187,379 |
| **Total Other Current Liabilities** | 187,379 |
| **Total Current Liabilities** | 191,712 |
| **Total Liabilities** | 191,712 |
| **Equity** | |
| **Restricted Assets** | 364,551 |
| **Unassigned/Unaapproriated** | 845,867 |

| | Feb 28, 22 |
|---|---|
| **Net Income** | -244,047 |
| **Total Equity** | 966,371 |
| **TOTAL LIABILITIES & EQUITY** | **1,158,083** |

# Sherwood Montessori
## Profit & Loss YTD Comparison
February 2022

| | Feb 22 | Jul '21 - Feb 22 |
|---|---|---|
| **Ordinary Income/Expense** | | |
| **Income** | | |
| **8000-Revenues** | 106,089 | 975,392 |
| **Total Income** | 106,089 | 975,392 |
| **Gross Profit** | 106,089 | 975,392 |
| **Expense** | | |
| **1000 Certificated Salaries** | 62,445 | 417,900 |
| **2000 Classified Salaries** | 49,062 | 305,209 |
| **3000-Employee Benefits** | 34,036 | 227,300 |
| **4000-Books and Supplies** | 6,637 | 66,149 |
| **5000 Services/Other Op. Exp.** | 25,236 | 202,880 |
| **Total Expense** | 177,417 | 1,219,439 |
| **Net Ordinary Income** | -71,328 | -244,047 |
| **Net Income** | **-71,328** | **-244,047** |

# Sherwood Montessori
## Board of Directors - Vendor Payments Report
### February 2022

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 02/01/2022 | DBT | Amazon.com | Flushable wipes | Office Supplies | 18.22 |
| Check | 02/02/2022 | DBT | Amazon.com | Flying disc toys | Instructional Supplies | 58.93 |
| Check | 02/02/2022 | DBT | Amazon.com | Ziploc sandwich bags | Office Supplies | 33.24 |
| Check | 02/02/2022 | EFT | Koren Clark Know Thy Self | Payment 2 of 2 | Contracted Service | 1,800.00 |
| Check | 02/02/2022 | 9347 | Angelina Bushnell | livescan | LiveScan and TB Test Services | 72.00 |
| Check | 02/02/2022 | 9348 | Marcie Lynn | Light balast/screen - Marlo's turtle | Instructional Supplies | 50.40 |
| Check | 02/02/2022 | 9352 | CSU CHICO EDUC | Paid intern S21 EDPI 1980 Michael W... | Contracted Service | 750.00 |
| Check | 02/03/2022 | DBT | Amazon.com | Music books | Instructional Supplies | 85.76 |
| Check | 02/03/2022 | DBT | USPS | Mailing | Postage | 26.38 |
| Check | 02/03/2022 | DBT | Office Depot | Office supplies | Office Supplies | 74.95 |
| Check | 02/03/2022 | DBT | Amazon.com | Food storage freezer bags | Office Supplies | 21.32 |
| Check | 02/03/2022 | DBT | Amazon.com | Long jump rope - 2 | PE Instruction | 20.37 |
| Check | 02/03/2022 | DBT | Amazon.com | Face mask cleaner | PPE | 17.15 |
| Check | 02/04/2022 | DBT | Law Offices of Young, Minney & Corr... | IEP Preparation | Attorney | 50.00 |
| Check | 02/04/2022 | 9349 | Richard Hirshen | Prep for class | Contracted Service | 315.00 |
| Check | 02/04/2022 | 9350 | Richard Hirshen | Food for class | Instructional Supplies | 81.66 |
| Check | 02/04/2022 | ACH | CharterSAFE | 21-22 P&L PREMIUM 8 | 5400-Liability Insurance | 2,641.00 |
| Check | 02/04/2022 | ACH | CharterSAFE | WC PREMIUM 8 | 3601-Workers Comp | 751.00 |
| Check | 02/06/2022 | DBT | Amazon.com | Food grade hydrogen peroxide | Instructional Supplies | 31.09 |
| Check | 02/07/2022 | DBT | Costco | Snacks | Food (Instructional) | 316.00 |
| Check | 02/07/2022 | DBT | Costco | Wipes | PPE | 28.96 |
| Check | 02/07/2022 | DBT | Costco | Supplies | Office Supplies | 27.98 |
| Check | 02/07/2022 | DBT | Office Depot | CLP, BND, 36PK | Office Supplies | 20.79 |
| Check | 02/08/2022 | EFT | Comcast 4454 | JANUARY-FEBRUARY SERVICE | Internet Service Provider | 228.28 |
| Check | 02/08/2022 | EFT | California Water Service Company | January service | Water | 40.92 |
| Check | 02/08/2022 | 9353 | Barbara Mandelbaum | Federal funding allocation | Grant Services | 262.50 |
| Check | 02/08/2022 | 9354 | E-rate Advisors | INV - 1491 - 3rd Q | Contracted Service | 375.00 |
| Check | 02/08/2022 | 9355 | Advanced Document | January service | Copier Lease | 442.95 |
| Check | 02/08/2022 | 9356 | CUSD | NOVEMBER 2021 FUA - INV 22-00111 | CUSD FUA Charges | 1,679.96 |
| Check | 02/08/2022 | DBT | Amazon.com | Thermal laminater | Office Supplies | 83.62 |
| Check | 02/08/2022 | DBT | Amazon.com | Hand writing paper | Instructional Supplies | 14.45 |
| Check | 02/08/2022 | DBT | Amazon.com | 3 Ring binder | Instructional Supplies | 30.04 |
| Check | 02/08/2022 | DBT | BCOE-Cfte | Restorative conferences training for staff | Contracted Service | 80.00 |
| Check | 02/08/2022 | DBT | Rethinking Stress | Webinar - Modupe Akinola | Instructional Supplies | 9.73 |
| Credit... | 02/08/2022 | | Mendes Supply Co. | Towels - Bond copy paper - Soap - Toil... | Custodial Supplies | 178.31 |
| Check | 02/08/2022 | DBT | Rethinking Stress | Webinar - Modupe Akinola | Instructional Supplies | 9.68 |
| Check | 02/09/2022 | DBT | Amazon.com | Ice maker machine | Office Supplies | 123.33 |
| Check | 02/09/2022 | DBT | Office Depot | Supplies | Office Supplies | 30.96 |
| Credit... | 02/09/2022 | | Microsoft | Subscription | Software Licensing | 6.50 |
| Credit... | 02/09/2022 | | Microsoft | Subscription - Prepay yearly charges | Software Licensing | 162.00 |
| Check | 02/09/2022 | DBT | BCOE-Cfte | Restorative conferences training for staff | Contracted Service | 80.00 |
| Check | 02/10/2022 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Check | 02/10/2022 | 9357 | North State Parent Magazine | Charter school directory | Advertising | 260.00 |
| Check | 02/10/2022 | 9358 | Hernandez Cleaning Service | INV 30478 | Housekeeping Services | 5,000.00 |
| Check | 02/10/2022 | 9359 | Carly DeMartini | ADAPTIVE PE - Independant contractor | SELPA | 640.00 |
| Check | 02/10/2022 | 9360 | Lily Strachan | Livescan | LiveScan and TB Test Services | 64.00 |
| Check | 02/10/2022 | EFT | Waste Management | January - SERVICE | Trash/Recycling | 128.68 |
| Check | 02/11/2022 | DBT | FoodMaxx | Cheese | Food (Instructional) | 1.99 |
| Check | 02/14/2022 | ACH | HP LEASE 7603 | Lease Payment - Customer ID 79160- ... | HP DIRECT LEASE | 316.21 |
| Check | 02/14/2022 | DBT | Costco | Snacks | Food (Instructional) | 388.64 |
| Check | 02/14/2022 | DBT | Costco | Masks | PPE | 36.42 |
| Check | 02/14/2022 | DBT | USPS | Mailing | Postage | 8.70 |
| Check | 02/14/2022 | DBT | IXL | Math, Language arts, Science, And So... | 5300-Dues and Membership | 35.95 |
| Check | 02/15/2022 | 9361 | Jillian Mansfield | Livescan | LiveScan and TB Test Services | 64.00 |
| Check | 02/15/2022 | DBT | TEA BAR CAFE | Meal for staff training - PBIS | Food - Meetings | 88.87 |
| Check | 02/15/2022 | DBT | Target | Ziplocs and coffee supplies | Office Supplies | 47.35 |
| Check | 02/15/2022 | ACH | COSTCO VISA CARD | JANUARY-FEB 15TH PURCHASES | SHERWOOD COSTCO VISA | 163.90 |
| Check | 02/16/2022 | EFT | Comcast Business 9110 | JANUARY-FEBRUARY | Internet Service Provider | 308.93 |
| Check | 02/16/2022 | EFT | Verizon Wireless | JAN-FEB SERVICE | Telephone, Cellular | 99.91 |
| Check | 02/16/2022 | EFT | PG & E | JAN-FEB SERVICE | Electricity | 561.38 |
| Credit... | 02/16/2022 | | DEVELOPMENTAL STUDIES | | Instructional Supplies | 864.38 |
| Check | 02/17/2022 | 9363 | Nery Cantolan | Livescan | LiveScan and TB Test Services | 64.00 |
| Check | 02/17/2022 | 9364 | Chico Country Day | NATALIE WREN - NURSE -Inv 10022-... | Contracted Service | 1,242.47 |
| Check | 02/17/2022 | EFT | Heather Fisher | Mileage | 5200-Travel and Conferences | 16.76 |
| Check | 02/17/2022 | DBT | Wufoo | FEBRUARY SERVICE | Online List Management | 19.00 |
| Check | 02/17/2022 | DBT | Amazon.com | Various cups | PPE | 15.65 |
| Credit... | 02/17/2022 | | Center for Collaborative Classroom | SIPPS Beginning level 4th edition | 4100-Textbooks/Core Curricula | 864.38 |
| Check | 02/18/2022 | DBT | Saddleback Educational Publishing | Hi-lo books | 4200-Books/reference Materials | 753.62 |
| Check | 02/19/2022 | DBT | Amazon.com | Trophy awards | Instructional Supplies | 11.25 |
| Check | 02/19/2022 | DBT | Indeed | Ad for job position | Advertising | 17.86 |
| Check | 02/19/2022 | DBT | Indeed | Ad for job position | Advertising | 48.93 |
| Check | 02/22/2022 | DBT | USPS | Mailing | Postage | 15.44 |
| Check | 02/22/2022 | DBT | Costco | Snacks | Food (Instructional) | 318.13 |
| Check | 02/22/2022 | DBT | Costco | Clorox wipes | Office Supplies | 50.00 |
| Check | 02/22/2022 | DBT | Office Depot | Glue sticks | Office Supplies | 45.22 |
| Check | 02/22/2022 | DBT | Amazon.com | HP Laptop | Computers and Electronics | 235.95 |
| Check | 02/23/2022 | DBT | Amazon.com | 4 year laptop warrantee | LAPTOP/CHROME WARRANTIES | 69.99 |
| Credit... | 02/23/2022 | | Mendes Supply Co. | Towels - Bond copy paper - Soap - Toil... | Custodial Supplies | 431.35 |
| Credit... | 02/23/2022 | | Best Buy | Chromebooks | Computers and Electronics | 303.22 |
| Credit... | 02/23/2022 | | Best Buy | Chromebooks | Computers and Electronics | 303.22 |
| Credit... | 02/23/2022 | | Best Buy | Warrantee | LAPTOP/CHROME WARRANTIES | 60.00 |
| Credit... | 02/23/2022 | | Best Buy | Warrantee | LAPTOP/CHROME WARRANTIES | 60.00 |
| Check | 02/23/2022 | EFT | Laura Swanson {Other} | Supervision | Contracted Service | 320.00 |
| Check | 02/23/2022 | EFT | Laura Swanson {Other} | Art supply organizer | Instructional Supplies | 26.80 |
| Check | 02/23/2022 | DBT | Amazon.com | MONTHLY PRIME FEE | 5300-Dues and Membership | 13.93 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 02/23/2022 | eft | Jessica Lusardi | Supplies | Instructional Supplies | 173.32 |
| Check | 02/24/2022 | DBT | Promevo | Chrome management console | Contracted Service | 38.00 |
| Check | 02/24/2022 | DBT | Creative Apple | Writing paper and ruled white paper | Instructional Supplies | 11.25 |
| Check | 02/28/2022 | EFT | HSA Bank | FEBRUARY 2022 | HSA - K. POWERS | 100.00 |
| Check | 02/28/2022 | 9362 | Macquarie Equipment Capital Inc | Kyocera Copier Lease - INV 23211 - F... | Copier Lease | 220.94 |
| Check | 02/28/2022 | DBT | Costco | Snacks | Food (Instructional) | 319.48 |
| Bill | 02/28/2022 | 2021/2... | Pat Casey | CONTRACT SERVICES - FEB 2022 | Business Manager Services | 4,000.00 |
| **TOTAL** | | | | | | **30,479.90** |

To: Board of Directors

From: Marta Taylor, SMPO Public Relations Coordinator
Subject: Sherwood Montessori Parents Organization

Report Date: March 24, 2022

Hello board, our last SMPO meeting was a success, compared to the last few meetings where no one would show up, we had parents joining and signing up for our events coming up.

Talking about events, our Cal skate night was so much fun, we skated, we laughed, It was awesome to reconnect as a community again. With the funds raised we will be able to purchase more PE equipment!

We have a restaurant takeover on April 6th, at Panda Express, the funds of this fundraiser will go towards our kitchen and garden.

Next event is our variety show (4/29) . How fun! Besides enjoying all of our kiddos talents, we will also enjoy some pizza and bake sales. All the money raised will help us fund our teacher appreciation day(5/3). We have a whole day planned for our amazing teachers, aides and all staff at Sherwood.

Lastly, bike to school day, hosted by our amazing PE teacher, Kimberly and Susi Maciel. They're in touch to have helmets and much more stuff to raffle for the big day!

That's all for the year, Board, thank you for everything you do for our school and children.

Best regards,

SMPO

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **LCAP Community Survey**

**Date:** March 24, 2022

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**SUMMARY**

Each year, Sherwood community members and students are asked to fill a survey for LCAP planning purposes.

**DISCUSSION**

Sherwood has a core of questions it typically poses to its community and students for feedback. During the pandemic, surveys were modified to collect input about distance learning.

Please consider the questions and propose any that would capture additional data the Board would like to collect. Questions in the Community Survey that generate data that is compared from year to year are highlighted. The Student Surveys are consistent from year to year.

This survey is broken into two parts:
1. Questions about Sherwood in general
2. Questions about Sherwood's response to the pandemic and planning for next year

**Questions about Sherwood in General**

How long have you been a member of the community?

0-1 year
2-4 years
More than 4 years
Perfer not to answer

Please rate your satisfaction with Sherwood in general for each of the following:

1. overall satisfaction
2. the teachers at Sherwood
3. curriculum, in terms of Montessori authenticity

4. support given to struggling learners
5. level of academic challenge
6. school's approach to discipline and conflict resolution
7. students' emotional well-being at school
8. school climate in terms of respectfulness and inclusivity

For any "less than satisfied" responses, can you please explain why?

We are always open to improving our program. Do you have any suggestions for ways the school could improve?

If you have a complaint about school, are you likely to bring it up to a teacher, staff member, or administration?

If you answered no, what could we do to make you feel more comfortable voicing your concerns?

Did you know that:

The board of directors meetings are open to the community?

During each board meeting there is an opportunity for public comment, including feedback about the school, concerns, complaints, compliments, and ideas?

That board meetings are held monthly?
That parents and teachers have an opportunity to vote for board members?

**Questions about Sherwood's Response to the Pandemic**

Please rate your satisfaction with each of the following:

Sherwood's response to safety during the pandemic
Learning materials provided during distance learning
Support for emotional well-being during distance learning
Technology provided by the school
Online programming provided: the Guidepost Montessori platform, Epic!, Mystery Science, TCI History and Science, RAZ Kids, Moby Max, other
Communication from the office
Communication from the classroom

Would you send your child to school for full time in-person learning in the 2021-2022 school year if available?

(If no) Would you participate in a 100% online learning program with a teacher assigned to lead distance learners only?

Would you be interested in a free, after school tutoring program starting in 2021-2022?

Would you be interested in free/affordable morning and/or after school child care in 2021-2022?

Please use the space below to share anything else you'd like to share. Thank you for your feedback!

Student Survey:

*For any "disagree" or "strongly disagree" responses, can you please explain why?*

1. I am happy to be a student at this school.

strongly agree ☐ agree ☐ neutral ☐ disagree ☐ strongly disagree ☐

---

2. I get to do interesting activities at school.

strongly agree ☐ agree ☐ neutral ☐ disagree ☐ strongly disagree ☐

---

3. I am learning a lot.

strongly agree ☐ agree ☐ neutral ☐ disagree ☐ strongly disagree ☐

---

4. I feel I am part of the school community.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

5. The adults at school treat me with kindness and respect.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

6. The students at school treat me with kindness and respect.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

7. The school helps students resolve conflicts with each other.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

8. I feel safe at school.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

9. The school rules are fair and easy to understand.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

Please share any other ideas you might have to improve Sherwood. Thanks for your feedback!

**ACTION REQUESTED**

Discuss Community Survey and Student Survey questions.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Board Elections**

**Date:** March 24, 2022

---

**SUMMARY**

The Board will be asked to discuss the elections for the Board.

**DISCUSSION**

The search for new Board members has begun with a recruitment letter from our Board Chair going out to the Sherwood Community. A diverse Board with expertise and interests that dovetail with the school's future initiatives would be most beneficial for Sherwood's success. A discussion that will generate action items for recruitment of future Board members is the next strategic move in the elections process.

Current bylaws related to the election process:

The Board of Directors will be selected in the following way:

1. An Elections Committee, appointed by the Board of Directors at a meeting in August, will accept applications for potential candidates. The Elections Committee shall be made up of two current members of the Board of Directors with terms that extend beyond the current year and one member of the Sherwood Montessori Parent Organization (SMPO);
2. The Elections Committee shall review applications and present a slate of candidates for consideration to the SMPO at the meeting in September. Voting will be carried out by the SMPO in consultation with the Elections Committee. Interim appointment shall be done in accordance with Article 4 Section 10 of these bylaws;
3. The top vote getter in the event of one seat being open or vote getters in the event of more than one seat being open shall win;
4. In the event of a tie, the deciding votes will be made by the Elections Committee.
5. New Directors will be announced before the end of the school year and will assume duties at the October meeting.

**ACTION REQUESTED**

Discuss elections.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Parsec Education Contract**

**Date:** March 24, 2022

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**SUMMARY**

The Board will be asked to approve a contract for services from Parsec Education.

**DISCUSSION**

Parsec Education comes with recommendations from other local charters who use their service. The company has developed a dashboard for looking at student data to identify growth that is not readily seen by end of year standardized tests. Parsec uses value added data to interpret results of formative data, allowing teachers to make adjustments that result in improved outcomes for student learning. The dashboard provides reports that will be useful for our renewal process.

**ACTION REQUESTED**

Approve contract.

Attachment: E-Rate Category 2 Proposal for FY22 Form 470 #220015012

# Parsec Education - Service Agreement

## Primary Contact Information

| Client | | Parsec Education | |
|---|---|---|---|
| *Client Legal Name ("Client")* | Sherwood Montessori | *Company Name* | Parsec Education |
| *Primary Contact, Title* | Michelle Yezbick, Director | *Primary Contact* | Eugene Park |
| *Billing / Payment Address* | 1010 Cleveland Ave. | *Billing Address* | 700 Van Ness Ave Ste 115 |
| *City / State / Zip* | Chico, CA 95928-6207 | *City / State / Zip* | Fresno, CA 93721 |
| *E-mail* | michelle@sherwoodmontessori.org | *E-mail* | eugene@parseceducation.com |
| *Phone* | (530) 345-6600 | *Phone* | (559) 235-9602 |

## Description of Services and Fees

**Description of Services**

License Fee(s):

- **ParsecGO's Data Analytics Dashboard**
  - Annual Base: $2,500
  - CA School Dashboard Filters
  - Cloud-based Data Warehouse
  - Student Enrollment
    - Historical Enrollment Analysis
    - Percentage Breakdown
  - State Assessment
    - Overall
    - Claim Areas
    - Distance From Standard
    - Trend Analysis
    - Spread Analysis
    - Enrollment Length
    - Growth Model
  - Local Assessment
    - Overall
    - By Race/Ethnicity
    - By Student Group
    - Trend Analysis
    - Growth Analysis
    - Correlation Analysis (3rd-6th)
    - Correlation Analysis (MS & HS)
  - $5 per student fee

Service Fee(s):

- **Consultation (optional)**
  - $200/hr with Principal Data Scientist (Eugene)
  - $150/hr with Senior/Junior Data Scientists

**Fees**

| | |
|---|---|
| *Effective Date:* | |
| *Termination Date:* | 6/30/2023 |
| *License Fee:* | |
| *Annual Maintenance Fee* | $2500.00 |
| *2020-21 Enrollment ( 122)* | $610.00 |
| *Service Fee(s):* | |
| 5-hours online support per year | $1,000.00 |
| In-person one-day data capacity/improvement science and Power Standards workshop | $2,875.00 |
| *Discount(s):* | |
| *Before discount(s)* | $6,985.00 |
| *New client: 10% discount* | -$698.50 |

# Parsec Education - Service Agreement

| | | |
|---|---|---|
| | *Total:* | **$6,286.50** |

## Other Terms and Conditions

| |
|---|
| |

## Agreement

The agreement by and between the Client and Parsec Education consists of this Service Order and the Terms and Conditions attached to the Service Order.

## Authorization

By signing below, the parties hereto ACCEPT AND AGREE to this Agreement as of the last date executed.

| | | |
|---|---|---|
| Client Signature: | Print Name, Title: | Date: |
| Parsec Education Signature: | Print Name, Title:<br>Eugene Park, Founder | Date: |

## Terms and Conditions

**1 RIGHT TO USE Parsec Education's Proprietary Technologies and Design Templates**

1.1 Parsec Education's Proprietary Technologies and Design Templates. Subject to the terms and conditions of this Agreement, Parsec Education hereby grants Client the limited, non-exclusive, non-transferable, non-sub-licensable right to access and use Parsec Education's proprietary technologies and design templates during the Term solely for Client's use (including use by Client's students and staff, as described in the SO, if applicable ("Authorized Users")).

1.2 Limitations. The following limitations and restrictions will apply to Parsec Education's proprietary technologies and design templates: (a) Client will not provide access to Parsec Education's proprietary technologies and design templates to any person who is not an employee or contractor of Client or an Authorized User. (b) Except as expressly permitted hereunder, Client will not and will not permit or authorize any third party to: (i) reverse engineer, decompile, disassemble or otherwise attempt to discover the source code, object code or underlying structure, ideas or algorithms of Parsec Education's proprietary technologies and design templates; (ii) modify, translate or create derivative works based on Parsec Education's proprietary technologies and design templates; (iii) copy, rent, lease, distribute, pledge, assign or otherwise transfer or allow any lien, security interest or other encumbrance on Parsec Education's proprietary technologies and design templates; (iv) use Parsec Education's proprietary technologies and design templates for time sharing or service bureau purposes or otherwise for the benefit of a third party; (v) hack, manipulate, interfere with or disrupt the integrity or performance of or otherwise attempt to gain unauthorized access to Parsec Education's proprietary technologies and design templates or its related systems, hardware or networks or any content or technology incorporated in any of the foregoing; or (vi) remove or obscure any proprietary notices or labels of Parsec Education or its suppliers on Parsec Education's proprietary technologies and design templates.

**2 OWNERSHIP; RESERVATION OF RIGHTS**

2.1 Client Ownership. Client owns (a) any data Client inputs into Parsec Education's proprietary technologies and design templates that identifies Client or its students and staff (including Authorized Users), and (b) any other data and content provided by Client or Authorized Users to Parsec Education or input into Parsec Education's proprietary technologies and design templates. Client hereby grants to Parsec Education a non-exclusive, worldwide, royalty-free, fully paid up, sub-licensable (through multiple tiers) (i) right and license during the Term to copy, distribute, display and create derivative works of and use the Client Data to perform Parsec Education's obligations under this Agreement, as long as it does not violate 20 U.S.C. 1232g - Family Educational and Privacy Rights; (ii) perpetual, irrevocable right and license to copy, modify and use Client Data to create aggregated,

non-personally identifiable data or information (“Blind Data”) and copy, distribute, display, create derivative works of and use the Blind Data for benchmarking, research or development purposes, including published research, in compliance with 20 U.S.C. 1232g - Family Educational and Privacy Rights, and (iii) perpetual, irrevocable right and license to copy, distribute, display and create derivative works of and use Other Data for any and all purposes, in any form, media or manner, in compliance with 20 U.S.C. 1232g - Family Educational and Privacy Rights. Client reserves any and all right, title, and interest in and to the Client Data other than the licenses therein expressly granted to Parsec Education under this Agreement.

2.2 Parsec Education Ownership. Parsec Education retains all right, title, and interest in and to Parsec Education's proprietary technologies and design templates AND general design, algorithm, and final product of custom-built data analytics tools and report builders, all copies or parts thereof (by whomever produced) and all intellectual property rights therein. Parsec Education grants no and reserves any and all rights other than the rights expressly granted to Client under this Agreement with respect to Parsec Education's proprietary technologies and design templates.

2.3 Feedback. The Client may, from time to time, provide suggestions, comments for enhancements or functionality, or other feedback (“Feedback”) to Parsec Education with respect to Parsec Education's proprietary technologies and design templates. Parsec Education has full discretion to determine whether to proceed with the development of the requested enhancements, features, or functionality. Client hereby grants Parsec Education a royalty-free, fully paid-up, worldwide, transferable, sub-licensable, irrevocable, perpetual license to (a) copy, distribute, transmit, display, perform, and create derivative works of the Feedback in whole or in part; and (b) use the Feedback in whole or in part, including without limitation, the right to develop, manufacture, have manufactured, market, promote, sell, have sold, offer for sale, have offered for sale, import, have imported, rent, provide and lease products or services that practice or embody, or are configured for use in practicing, the Feedback in whole or in part.

2.4 Client Responsibilities. Client will (a) use commercially reasonable efforts to prevent unauthorized access to or use of Parsec Education's proprietary technologies and design templates and notify Parsec Education promptly of any such unauthorized access or use, and (b) use Parsec Education's proprietary technologies and design templates only in accordance with the documentation and applicable laws and regulations.

2.5 Data Security. Parsec Education will implement and maintain reasonable administrative, physical and technical safeguards (“Safeguards”) which attempt to prevent any collection, use or disclosure of, or access to Client Data that this Agreement does not expressly authorize, including, without limitation, an information security program that meets commercially reasonable industry practice to safeguard Client Data. Such information security program includes: (a) physical security of all premises in which Client Data will be processed and/or stored; and (b) reasonable precautions taken with respect to the employment of, access given to, and education and training of any and all personnel furnished or engaged by Parsec Education to perform any part of the services hereunder.

2.6 Privacy Policy. Parsec Education cares deeply about privacy, and we recognize that it is vital to the educators, students, and other clients we serve. Please see our Privacy Policy at https://www.parseceducation.com/pages/student-privacy for more information about how we protect the privacy of those we serve.

2.7 Right to Data Destruction. If requested by the Client, during or after the term of this agreement, Parsec Education will make reasonable efforts to destroy or otherwise render Client Data inaccessible and no longer available for any future usage..

**3 FEES; PAYMENT TERMS**

3.1 Fees; Payment Terms. Unless otherwise indicated on the SO, the Client will pay all fees within thirty (30) days of the invoice date. If payment of any fee is not made when due and payable, a late fee will accrue at the rate of the lesser of one and one-half percent (1.5%) per month or the highest legal rate permitted by law and Client will pay all reasonable expenses of collection. In addition, if any past due payment has not been received by Parsec Education within thirty (30) days from the time such payment is due, Parsec Education may suspend access to Parsec Education's proprietary technologies and design templates until such payment is made.

3.2 Net of Taxes. All amounts payable by Client to Parsec Education hereunder are exclusive of any sales, use and other taxes or duties, however, designated, including without limitation, withholding taxes, royalties, know-how payments, customs, privilege, excise, sales, use, value-added and property taxes (collectively “Taxes"). The Client will be solely responsible for payment of any Taxes, except for those taxes based on the income of Parsec Education. The Client will not withhold any Taxes from any amounts due to Parsec Education.

**4 TERM, TERMINATION**

# Parsec Education - Service Agreement

4.1 Term. The term of this Agreement will commence on the Effective Date and, unless earlier terminated in accordance with this Section 4, will continue through the date set forth on the SO (the “Term”).

4.2 Termination; Effect of Termination. In addition to any other remedies it may have, either party may terminate this Agreement if the other party breaches any of the terms or conditions of this Agreement and fails to cure such breach within thirty (30) days’ notice (or ten (10) days in the case of nonpayment) after receiving notice thereof. Upon any termination of this Agreement, Client will pay in full for the use of Parsec Education's proprietary technologies and design templates and all rendered services up to and including the last day on which Parsec Education's proprietary technologies and design templates are provided. Upon any termination of this Agreement for any reason, Parsec Education may, but is not obligated to, in its sole discretion and without delivery of any notice to Client, delete any Client Data stored or otherwise archived on Parsec Education's proprietary technologies and design templates or on Parsec Education’s network. Upon receiving notice to delete any Client Data stored or otherwise archived, Parsec Education will delete the Client Data within (3) days. Upon termination of this Agreement, all rights granted hereunder and all obligations of Parsec Education to provide Parsec Education's proprietary technologies and design templates will immediately terminate and Client will (a) cease use of Parsec Education's proprietary technologies and design templates; and (b) return or destroy all other copies or other embodiments of Parsec Education’s Confidential Information.

4.3 Survival. Upon expiration or termination of this Agreement, all obligations in this Agreement will terminate, provided that Sections 2 (Ownership; Reservation of Rights), 3 (Fees; Payment Terms), 4.2 (Termination; Effect of Termination), 4.3 (Survival), 5 (Confidentiality), 6.2 (Disclaimer), 7 (Limitations of Liability; Indemnification), and 8 (General) will survive.

**5 CONFIDENTIALITY**

5.1 As used herein, “Confidential Information” means, subject to the exceptions set forth in the following sentence, any information or data, regardless of whether it is in tangible form, disclosed by either party (the “Disclosing Party”) that the Disclosing Party has either marked as confidential or proprietary, or has identified in writing as confidential or proprietary within thirty (30) days of disclosure to the other party (the “Receiving Party”); provided, however, that a Disclosing Party’s business plans, strategies, technology, research and development, current and prospective Clients, billing records, and products or services will be deemed Confidential Information of the Disclosing Party even if not so marked or identified. All information that may not be marked as confidential should be maintained as private information in compliance with20 U.S.C. 1232g - Family Educational and Privacy Rights.

5.2 Parsec Education’s Confidential Information includes, without limitation, Parsec Education's proprietary technologies and design templates and the terms of this Agreement. Information will not be deemed “Confidential Information” if such information: (a) is known to the Receiving Party prior to receipt from the Disclosing Party directly or indirectly from a source other than one having an obligation of confidentiality to the Disclosing Party; (b) becomes known (independently of disclosure by the Disclosing Party) to the Receiving Party directly or indirectly from a source other than one having an obligation of confidentiality to the Disclosing Party; or (c) becomes publicly known or otherwise ceases to be secret or confidential, except through a breach of this Agreement by the Receiving Party. Each party acknowledges that the Confidential Information constitutes valuable trade secrets and proprietary information of a party, and each party agrees that it will use the Confidential Information of the other party solely in accordance with the provisions of this Agreement and it will not disclose, or permit to be disclosed, the same directly or indirectly, to any third party without the other party’s prior written consent, except as otherwise permitted hereunder. Each party will use reasonable measures to protect the confidentiality and value of the other party’s Confidential Information. Notwithstanding any provision of this Agreement, either party may disclose the terms of this Agreement, in whole or in part (i) to its employees, officers, directors, professional advisors (e.g., attorneys, auditors, financial advisors, accountants and other professional representatives), existing and prospective investors or acquirers contemplating a potential investment in or acquisition of a party, sources of debt financing, acquirers and/or subcontractors who have a need to know and are legally bound to keep such Confidential Information confidential by confidentiality obligations or, in the case of professional advisors, are bound by ethical duties to keep such Confidential Information confidential consistent with the terms of this Agreement; and (ii) as reasonably deemed by a party to be required by law (in which case each party will provide the other with prior written notification thereof, will provide such party with the opportunity to contest such disclosure, and will use its reasonable efforts to minimize such disclosure to the extent permitted by applicable law). Each party agrees to exercise due care in protecting the Confidential Information from unauthorized use and disclosure. In the event of an actual or threatened breach of the provisions of this Section, the non-breaching party will be entitled to seek immediate injunctive and other equitable relief, without waiving any other rights or remedies available to it. Each party will promptly notify the other in writing if it becomes aware of any violations of the confidentiality obligations set forth in this Agreement. Upon the termination of this Agreement, each Receiving Party agrees to promptly return to the Disclosing Party or destroy all Confidential Information of the Disclosing Party that is in possession of the Receiving Party and to certify the return or destruction of all such Confidential Information and embodiments thereof.

# Parsec Education - Service Agreement

**6 REPRESENTATIONS, WARRANTIES AND DISCLAIMER**

6.1 Representations and Warranties. Each party represents and warrants to the other party that (a) such party has the required power and authority to enter into this Agreement and to perform its obligations hereunder, (b) the execution of this Agreement and performance of its obligations hereunder do not and will not violate any other agreement to which it is a party, and (c) this Agreement constitutes a legal, valid and binding obligation when signed by both parties. Client represents and warrants that it has the right to provide the Client Identifying Data and Client Content for the purposes contemplated by this Agreement.

6.2 Disclaimer. EXCEPT AS EXPRESSLY SET FORTH HEREIN, Parsec Education's proprietary technologies and design templates ARE PROVIDED ON AN “AS-IS” BASIS AND Parsec Education DISCLAIMS ANY AND ALL WARRANTIES. EXCEPT AS OTHERWISE EXPRESSLY PROVIDED IN THIS AGREEMENT, NEITHER PARTY MAKES ANY ADDITIONAL REPRESENTATION OR WARRANTY OF ANY KIND, WHETHER EXPRESS, IMPLIED (EITHER IN FACT OR BY OPERATION OF LAW), OR STATUTORY, AS TO ANY MATTER WHATSOEVER. ALL OTHER EXPRESS OR IMPLIED CONDITIONS, REPRESENTATIONS AND WARRANTIES ARE HEREBY EXCLUDED TO THE EXTENT ALLOWED BY APPLICABLE LAW. EACH PARTY EXPRESSLY DISCLAIMS ALL IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, QUALITY, ACCURACY, TITLE, AND NON- INFRINGEMENT. NEITHER PARTY WARRANTS AGAINST INTERFERENCE WITH THE ENJOYMENT OF THE PRODUCTS OR SERVICES PROVIDED BY SUCH PARTY OR AGAINST INFRINGEMENT. NEITHER PARTY WARRANTS THAT THE PRODUCTS OR SERVICES PROVIDED BY SUCH PARTY ARE ERROR-FREE OR THAT OPERATION OF SUCH PARTY’S PRODUCTS OR SERVICES WILL BE SECURE OR UNINTERRUPTED. NEITHER PARTY WILL HAVE THE RIGHT TO MAKE OR PASS ON ANY REPRESENTATION OR WARRANTY ON BEHALF OF THE OTHER PARTY TO ANY THIRD PARTY.

**7 LIMITATIONS OF LIABILITY; INDEMNIFICATION**

7.1 Disclaimer of Consequential Damages. THE PARTIES HERETO AGREE THAT, NOTWITHSTANDING ANY OTHER PROVISION IN THIS AGREEMENT, EXCEPT FOR (A) CLIENT’S USE OF Parsec Education's proprietary technologies and design templates OTHER THAN EXPRESSLY PERMITTED BY SECTION 1 (RIGHT TO USE Parsec Education's Proprietary Technologies and Design Templates) ABOVE, (B) EITHER PARTY’S BREACH OF SECTION 5 (CONFIDENTIALITY) ABOVE, AND (C) LIABILITY ARISING FROM A PARTY’S INDEMNIFICATION OBLIGATIONS SET FORTH IN SECTION 7.4 AND 7.5 BELOW, IN NO EVENT WILL EITHER PARTY BE LIABLE TO THE OTHER FOR ANY SPECIAL, INDIRECT, RELIANCE, INCIDENTAL OR CONSEQUENTIAL DAMAGES OF ANY KIND, LOST OR DAMAGED DATA, LOST PROFITS OR LOST REVENUE, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), OR OTHERWISE, EVEN IF A PARTY HAS BEEN NOTIFIED OF THE POSSIBILITY THEREOF.

7.2 GENERAL CAP ON LIABILITY. NOTWITHSTANDING ANY OTHER PROVISION OF THIS AGREEMENT, EXCEPT FOR (A) CLIENT’S USE OF Parsec Education's proprietary technologies and design templates OTHER THAN EXPRESSLY PERMITTED BY SECTION 1 (RIGHT TO USE Parsec Education's Proprietary Technologies and Design Templates) ABOVE, (B) EITHER PARTY’S BREACH OF SECTION 5 (CONFIDENTIALITY) ABOVE, AND (C) LIABILITY ARISING FROM A PARTY’S INDEMNIFICATION OBLIGATIONS SET FORTH IN SECTION 7.4 AND 7.5 BELOW, AS APPLICABLE, UNDER NO CIRCUMSTANCES WILL EITHER PARTY’S LIABILITY FOR ALL CLAIMS ARISING UNDER OR RELATING TO THIS AGREEMENT (INCLUDING BUT NOT LIMITED TO WARRANTY CLAIMS), REGARDLESS OF THE FORUM AND REGARDLESS OF WHETHER ANY ACTION OR CLAIM IS BASED ON CONTRACT, TORT, OR OTHERWISE, EXCEED THE AGGREGATE FEES PAID BY CLIENT TO Parsec Education UNDER THIS AGREEMENT DURING THE TWELVE (12) MONTH PERIOD PRECEDING THE EVENT OR CIRCUMSTANCES GIVING RISE TO SUCH LIABILITY. THIS LIMITATION OF LIABILITY IS CUMULATIVE AND NOT PER INCIDENT.

7.3 INDEPENDENT ALLOCATIONS OF RISK. EACH PROVISION OF THIS AGREEMENT THAT PROVIDES FOR A LIMITATION OF LIABILITY, DISCLAIMER OF WARRANTIES, OR EXCLUSION OF DAMAGES IS TO ALLOCATE THE RISKS OF THIS AGREEMENT BETWEEN THE PARTIES. EACH OF THESE PROVISIONS IS SEVERABLE AND INDEPENDENT OF ALL OTHER PROVISIONS OF THIS AGREEMENT, AND EACH OF THESE PROVISIONS WILL APPLY EVEN IF THEY HAVE FAILED OF THEIR ESSENTIAL PURPOSE.

7.4 Indemnification by Parsec Education. Except for liability for which Client is responsible under Section

7.5, Parsec Education will indemnify, defend and hold Client and the officers, directors, agents, and employees of Client (“Client Indemnified Parties”) harmless from settlement amounts and damages, liabilities, penalties, costs and expenses (“Liabilities”) that are payable to any third party or incurred by the Client Indemnified Parties (including reasonable attorney’s fees) arising from any third party claim, demand or allegation that the use of Parsec Education's proprietary technologies and design templates in accordance with the terms and conditions of this Agreement infringes such third party’s copyright or results in a misappropriation of such third party’s trade secrets. Parsec Education will have no liability or obligation under this Section 7.4 if such Liability is caused in whole or in part by (a) modification of Parsec Education's proprietary technologies and design templates by any party other than Parsec Education without Parsec Education’s express consent; (b) the combination, operation, or

use of the Parsec Education with other product(s), data or services not provided by Parsec Education where the Parsec Education's Proprietary Technologies and Design Templates would not by itself be infringing; or (c) unauthorized or improper use of Parsec Education's proprietary technologies and design templates. If the use of Parsec Education's proprietary technologies and design templates by Client has become, or in Parsec Education's opinion is likely to become, the subject of any claim of infringement, Parsec Education may at its option and expense (i) procure for Client the right to continue using Parsec Education's proprietary technologies and design templates as set forth hereunder; (ii) replace or modify Parsec Education's proprietary technologies and design templates to make it non-infringing so long as Parsec Education's proprietary technologies and design templates have at least equivalent functionality; (iii) substitute an equivalent for Parsec Education's proprietary technologies and design templates or (iv) if options (i)-(iii) are not available on commercially reasonable terms, terminate this Agreement. Section 7.4 states Parsec Education's entire obligation and Client's sole remedies in connection with any claim regarding the intellectual property rights of any third party. 7.5 Indemnification by Client. Client will indemnify, defend and hold Parsec Education and the officers, directors, agents, and employees of Parsec Education ("Parsec Education Indemnified Parties") harmless from Liabilities that are payable to any third party or incurred by the Parsec Education Indemnified Parties (including reasonable attorneys' fees) arising from any third party claim, demand or allegation arising from or related to (a) any use by Client or Authorized Users of Parsec Education's proprietary technologies and design templates in violation of this Agreement or (b) the Client Data.

7.6 Indemnification Procedure. If a Client Indemnified Party or a Parsec Education Indemnified Party (each, an "Indemnified Party") becomes aware of any matter it believes it should be indemnified under Section 7.4 or Section 7.5, as applicable, involving any claim, action, suit, investigation, arbitration or other proceedings against the Indemnified Party by any third party (each an "Action"), the Indemnified Party will give the other party (the "Indemnifying Party") prompt written notice of such Action. The Indemnified Party will cooperate, at the expense of the Indemnifying Party, with the Indemnifying Party and its counsel in the defense, and the Indemnified Party will have the right to participate fully, at its own expense, in defense of such Action with counsel of its own choosing. Any compromise or settlement of an Action will require the prior written consent of both Parties hereunder, such consent not to be unreasonably withheld or delayed.

**8 GENERAL**

Client may not remove or export from, or use from outside, the United States or allow the export or re-export of Parsec Education's proprietary technologies and design templates or anything related thereto, or any direct product thereof in violation of any restrictions, laws or regulations of the United States Department of Commerce, the United States Department of Treasury Office of Foreign Assets Control, or any other United States or foreign agency or authority. If any provision of this Agreement is found to be unenforceable or invalid, that provision will be limited or eliminated to the minimum extent necessary so that this Agreement will otherwise remain in full force and effect and enforceable. Neither party may assign this Agreement by operation of law or otherwise or assign or delegate its rights or obligations under the Agreement without the other party's prior written consent; provided however, that either party may assign this Agreement to an acquirer of or successor to all or substantially all of its business or assets to which this Agreement relates, whether by merger, sale of assets, sale of stock, reorganization or otherwise. Any assignment or attempted assignment by either party otherwise than in accordance with this Section 8 will be null and void. Both parties agree that this Agreement, including the Service Order, is the complete and exclusive statement of the mutual understanding of the parties and supersedes and cancels all previous written and oral agreements, communications and other understandings relating to the subject matter of this Agreement, and that all waivers and modifications must be in writing signed by both parties, except as otherwise provided herein. No agency, partnership, joint venture, or employment is created as a result of this Agreement, and a party does not have any authority of any kind to bind the other party in any respect whatsoever. In any action or proceeding to enforce rights under this Agreement, the prevailing party will be entitled to recover costs and attorneys' fees. The Client acknowledges that any unauthorized use of Parsec Education's proprietary technologies and design templates will cause irreparable harm and injury to Parsec Education for which there is no adequate remedy at law. In addition to all other remedies available under this Agreement, at law or in equity, Client further agrees that Parsec Education will be entitled to injunctive relief in the event Client uses Parsec Education's proprietary technologies and design templates in violation of the limited license granted herein or uses Parsec Education's proprietary technologies and design templates in any way not expressly permitted by this Agreement. All notices under this Agreement will be in writing and sent to the recipient's address set forth in the SO and will be deemed to have been duly given when received, if personally delivered; when receipt is electronically confirmed, if transmitted by facsimile or email; the day after it is sent, if sent for next day delivery by recognized overnight delivery service; and upon receipt, if sent by certified or registered mail, return receipt requested. Each party agrees that it will not, without the prior written consent of the other, issue a press release regarding their business relationship. Notwithstanding anything herein to the contrary, Parsec Education may identify Client and the relationship between Parsec Education and Client in Parsec Education's marketing collateral, website, and other promotional and marketing materials. Each party will be excused from performance for any period during which, and to the extent that, it is prevented from performing any obligation or service, in whole or in part, as a result of a cause beyond its reasonable control and without its fault or negligence, including, but not limited to, acts of God, acts of war, epidemics, fire, communication line

failures, power failures, earthquakes, floods, blizzard, or other natural disasters (but excluding failure caused by a party's financial condition or any internal labor problems (including strikes, lockouts, work stoppages or slowdowns, or the threat thereof)) (a "Force Majeure Event"). Delays in performing obligations due to a Force Majeure Event will automatically extend the deadline for performing such obligations for a period equal to the duration of such Force Majeure Event. Except as otherwise agreed upon by the parties in writing, in the event such non-performance continues for a period of thirty (30) days or more, either party may terminate this Agreement by giving written notice thereof to the other party. Upon the occurrence of any Force Majeure Event, the affected party will give the other party written notice thereof as soon as reasonably practicable of its failure of performance, describing the cause and effect of such failure, and the anticipated duration of its inability to perform. This Agreement will be governed by the laws of the state of California without regard to its conflict of laws provisions. For all disputes relating to this Agreement, each party submits to the exclusive jurisdiction of the state and federal courts located in Fresno, California, and waives any jurisdictional, venue, or inconvenient forum objections to such courts.

**9 DATA SHARING**

Parsec Education will receive student-level state and local test scores and student/staff non-academic data and will use the data to analyze the results and generate summary reports at the request of the Client.

To initiate the project, the Client will share the Personally Identifiable Information (PII) with Parsec Education. The specific data sets to be provided are as follows:

[Student Name, Student Local ID, Student State ID, Date of Birth, Gender, Race/Ethnicity, Age, Program Participation Indicator, Email Address, Home Address, Grade Level, Parent/Guardian Name]

Client shall retain the right to disclose de-identified student data in place of PII.

Parsec Education agrees to comply with the provisions of the Family Educational Rights and Privacy Act ("FERPA") and applicable state law. Nothing in this Agreement may be construed to allow either Party to maintain, use, disclose, or share the PII in a manner not allowed under Federal or state law or regulation.

The Project will be conducted in a manner that does not permit the personal identification of parents and students by anyone other than representatives of Parsec Education with legitimate interests. Client has a right to review any report and final materials derived from the disclosed PII prior to publication to verify the use of proper disclosure avoidance techniques and the confidentiality of PII.

Parsec Education shall employ industry best practices, both technically and procedurally to protect the data from unauthorized physical and electronic access. To ensure the continued confidentiality and security of the data, the Parsec Education shall establish a system of safeguards that includes, but is not limited to, the following requirements:

(i) Procedures and systems that ensure all PII provided by Client are kept in secured facilities and access to such PII is exclusively limited to authorized personnel.

(ii) Procedures and systems that shall require the use of secure passwords to access the PII.

(iii) Procedures and systems, such as good practices for assigning passwords shall be developed and implemented to maintain the integrity of the PII.

(iv) Procedures and systems that ensure that all PII is maintained in a secure manner that prevents the interception, diversion. or other unauthorized access.

(v) PII shall not be transferred or stored on mobile devices (such as smartphones, tablets) or removable storage media.

(vi) All Parsec Education staff with access to PII shall be subjected to a criminal background check and have no record of any felony convictions or convictions of offenses involving moral turpitude. Any exceptions to this requirement must be approved in advance in writing by Client.

(vii) All Parsec Education staff with access to PII shall execute affidavits of nondisclosure indicating their individual agreement to comply with the requirements of FERPA in the handling of the PII.

In the event of an unauthorized release of PII, including the breach of any of Parsec Education's security obligations, or any other event requiring notification under applicable law, Parsec Education agrees to:

# Parsec Education - Service Agreement

- Immediately notify Client of such event within 24 hours of discovery; and
- Cooperate with Client to inform all such individuals in accordance with applicable laws; and
- Indemnify, hold harmless and defend Client and its directors, officers, and employees from and against any claims, damages, fees or other harm related to such a data breach.

Parsec Education agrees to use the PII for only the purposes of the Project as specified in this Agreement. Nothing in the Agreement shall be construed to authorize Parsec Education to have access to additional data from Client that is not included in the scope of the Agreement or to govern access to the PII by entities other than the Parties. Parsec Education shall not disclose the PII received under the Agreement with any other entity without prior written approval from Client. Parsec Education understands that the Agreement does not convey ownership of the PII to Parsec Education. Parsec Education acknowledges and agrees that, as between Parsec Education and Client, the PII continues to be the sole and exclusive property and under the direct control of Client and that Parsec Education's use of the PII is subject to the control and discretion of the Client.

Parsec Education shall not redisclose the PII disclosed under the Agreement except as authorized by FERPA. Parsec Education further agrees to not disclose PII obtained under this Agreement to any entity or person ineligible to receive data protected by FERPA, or prohibited from receiving data from any entity for any other reason. Client has the right to audit and/or monitor Parsec Education's policies, procedures and systems to ensure compliance with FERPA.

Within thirty (30) days after termination of this Agreement, Parsec Education will destroy all PII in written, electronic or other tangible form, computer memory, and any hard copy records and shall purge any copies of the PII from its computer systems. Parsec Education agrees to require all employees, contractors, or agents of any kind working on the project to comply with this provision. No other entity is authorized to continue using or accessing the PII obtained under the Agreement upon the termination of the Agreement and the Project described herein. Nothing in this Agreement authorizes Parsec Education to maintain the PII
beyond the time period needed to complete the Project.

The terms of this Agreement shall remain in effect until the termination date of the Agreement; Either party may terminate this Agreement by giving the other party notice in writing specifying the date of such termination, which shall be not less than 60 days after the date of receipt of such notice.

Parsec Education will not sell PII. Parsec Education will not use or disclose student information collected through the Project -(whether personal information or otherwise) for behavioral targeting of advertisements to students. Parsec Education will not build a personal profile of a student other than as necessary for completion of the Project.

# SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, April 21, 2022 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00 p.m.)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA** (6:05 p.m.)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, March 24, 2021.
**B.2 Middle School Field Trip** Consider approval of field trip to Shakespeare Festival in Ashland, Oregon.
**B.3 Acceptance of Prop 39 Offer of Facilities** Consider accepting the offer of facilities from CUSD.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6:20)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**
**E.2.5 Chair Report**

**E.3 Action Items** (6:35)

**E.3.1 Enrollment and Class Configurations** The Board will be asked to discuss the model for class configurations for the 2022-2023 school year.
**Action Requested:** Discuss 2022-2023 class configurations.

**F. CLOSED SESSION** (6:55)

**F.1 Public Employee Performance Evaluation**

With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director.

**G. FUTURE AGENDA ITEMS** (7:10)

The Board will be asked to discuss the 2022-2023 Local Control Accountability Plan (LCAP) and adopt the LCAP at a subsequent meeting before June 30. The Board will receive an update on Board Elections.

**H. ADJOURNMENT** (7:15)

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SHERWOOD MONTESSORI

**REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
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Dial by your location
+1 669 900 6833 US (San Jose)
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+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, March 24, 2022 – 6:00 p.m.**

**MINUTES**

**A. CALL TO ORDER**

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*Meeting was called to order at 6:04 PM by Russell Shapiro. Beth Hammer, Robyn Howley and Karey Cooper were in attendance, Dan LaBar was absent.*

**B. CONSENT AGENDA**

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, February 17, 2021 and Special Meeting, March 10, 2022.
**B.2 Approval of Auditor Proposal** Consider approval of proposal of service for annual financial audit for three years.

*Consent agenda was reviewed by Board, Karey Cooper moved to approve and Robyn Howley seconded with unanimous approval by present Board members.*

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**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA**

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

*None*

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS**

**E.1 Items Removed from Consent (If any)**

*None*

**E.2 Reports and Communications**

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 School Director Report**
**E.2.2 Treasurer Report**
**E.2.3 SMPO Report**
**E.2.4 Chair Report**

*Michelle Yezbick presented the School Director Report, Pat Casey presented the Treasurer Report, Russell Shapiro presented the SMPO Report. There were no updates on the Chair Report. Discussion followed.*

**E.3 Action Items**

**E.3.1 Community Surveys** The Board will be asked to give input regarding the Community Surveys and Student Surveys that will generate valuable data for school improvement.
**Action Requested:** Discuss community surveys.

*Michelle Yesbick presented community survey and reviewed data collection. Discussion followed.*

**E.3.2 Elections** The Board will have a discussion of anticipated school needs with the goal of strategic recruitment of candidates for the Sherwood Board of Directors.
**Action Requested:** Discuss elections.

*Russell Shapiro reviewed election process. Discussion followed.*

**E.3.3 Parsec Education Service Agreement** Consider approval of contract for services from Parsec Education.
**Action Requested:** Approve contract.

*Michelle Yezbick presented contract for Parsec services. Discussion followed. Karey Cooper moved to approve and Robyn Howley seconded with unanimous approval by present Board members.*

**F. FUTURE AGENDA ITEMS**

Closed session to discuss School Direction review will be moved to next Board meeting

The Board will be asked to discuss the 2022-2023 Local Control Accountability Plan (LCAP) and adopt the LCAP at a subsequent meeting before June 30. The Board will receive an update on Board Elections.

**G. ADJOURNMENT**

*Meeting adjourned at 6:57 by Russell Shapiro*

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# SHERWOOD MONTESSORI

Countdown to Ashland!

Dear 7th/8th Grade Parents:
The countdown to Ashland has begun! Sherwood Montessori 7th and 8th grade students have the wonderful opportunity to see some of the best regional theatre in the nation at the Oregon Shakespeare Festival in beautiful Ashland, Oregon. Mark your calendars for May 10th-13th when students, teachers and chaperones will travel up North. Students will reside in the Southern Oregon University's campus dorms, and meals will be eaten at the cafeteria. Plays scheduled are *How I Learned What I Learned*, *Once on This Island: A Musical*, and *Unseen*. Descriptions of the plays can be found at the OSF website: www.osfashland.org. Some chaperones will be needed. If you are interested please indicate on the attached form. **Please note that chaperone fees are the same as student fees detailed below unless the chaperone requests a single room then costs are an extra $20/night.**

**Tickets:**
3 tickets at 28.75 = 86.25
**Meals:**
5/10 Dinner (12.50)
5/11 Breakfast (8.25), Lunch (9.50), Dinner (12.50)
5/12 Breakfast (8.25), Lunch (9.50), Dinner(12.50)
5/13 Breakfast (8.25), Sack Lunch (12.00)
Total meals= 93.25
**Lodging:**
Lodging for three nights 42.00x 3 = 126.00

**Total cost pre fundraising:$305.50 per student**
Total fundraising offset as of 4/12 $197.00 per student
The students have been organizing fundraising activities to assist with costs. Payments should be made out to Sherwood Montessori and turned into the office. If you would like to make a donation to families experiencing financial hardship, please turn it into the office as well and indicate on the check that you are making a donation. The students have been organizing fundraising activities to assist with costs and we will have financial aid forms available in the office.

**Tuesday, May 10th**
7:00-7:15 a.m. Arrive at 7:00a.m. to pack up cars. Departure at 7:15 a.m. from Sherwood Montessori parking lot (lunch stop at a rest area along the way).

~11:45 a.m. Arrive in Ashland. Check into SOU dorms.

1:30p.m. First workshop st SOU The Play: Genre/ConceptDesign/Characters Discussion/Lecture.

5:30p.m. Dinner at SOU cafeteria.

8:00 p.m. Curtain call for *How I Learned What I Learned* in the Angus Bowmer Theatre.

**Wednesday, May 11th**
7:00-8:00 a.m. Breakfast at SOU campus.

9:30 a.m. Stage Combat Workshop.

12:00 p.m. Lunch at SOU cafeteria.

1:30 p.m. Walk in Lithia Park/Downtown Ashland.

5:30 p.m. Dinner in SOU cafeteria.

8:00 p.m. Curtain call for *Once on This Island: A Musical* in the Angus Bowman Theatre.

**Thursday, May 12th**
7:00-8:00 a.m. Breakfast at SOU campus.

9:30 a.m. Finding Our Tales Workshop

12:00 p.m. Lunch at SOU cafeteria.

1:30 p.m. Curtain call for *Unseen* in the Thomas Theatre

5:30 p.m. Dinner in SOU cafeteria.

7:30 p.m. Meet in main room for games and snacks

**Friday, May 13th**
7:00-8:00 a.m. Breakfast at SOU campus. Depart for Chico (lunch stop at a rest area along the way).

# SHERWOOD MONTESSORI

Oregon Shakespeare Festival/Ashland Field Trip Behavior Contract

Student Name:_____

Departure Date: 5/10/22 Return Date: 5/13/22

It is the expectation of Sherwood Montessori Charter School that students abide by the behavioral expectations as outlined in the Sherwood Montessori Family Handbook. If you would like to review the handbook, please request one from the office or access on-line at www.sherwoodmontessori.org.

Actions will be taken for violating activities described below:

1. Students will abide by the rules set for room assignment and occupancy. Students will not switch rooms, or try to occupy another student's room.
2. Students found to be under the influence or in possession of drugs or alcohol during the course of the trip will be excluded from remaining field trip activities and will be returned home. Parents/guardians will be asked to come to Ashland and pick up their student.

All other rules and expectations set by the teacher are to be followed at all times. These are set to ensure the safety of all students attending the trip. The teacher reserves the right to exclude a student from any and all activities if their behavior is disrespectful, dangerous, or violates any of our behavioral expectations. If a student is unable to follow these rules, they may be sent home and the parent/guardian will be required to come to Ashland and pick up their student.

I understand the information listed above.

Student Signature:_____

Parent/Guardian signature:_____

Date:_____

SHERWOOD MONTESSORI

**REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS**

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https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
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+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
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Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

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**MINUTES**

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**E.2.3 SMPO Report**
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**Administrative Offices**
1163 E. Seventh Street
Chico, CA 95928-5999

530 / 891-3000
fax: 891-3220
www.ChicoUSD.org

**Facilities Department**
2455 Carmichael Drive
Chico, CA 95928

(530) 891-3000 x 20602
Fax:(530) 891-3190

**VIA ELECTRONIC AND CERTIFIED MAIL**

March 31, 2022

Ms. Michelle Yezbick, Director
Sherwood Montessori
1010 Cleveland Avenue
Chico, CA 95928

Re: Final Offer for Use of Chico Unified School District Facilities in 2022/23

Dear Ms. Yezbick:

In response to your letter dated February 14, 2022 accepting the District's Preliminary Offer, this letter constitutes the Chico Unified School District's (CUSD's) Final Offer of Facilities to Sherwood Montessori (Sherwood) under Education Code §47614 ("Proposition 39") and California Administrative Code of Regulations, Title 5 §11969.9(h). CUSD offers the shared use of CUSD facilities at Chapman Elementary School, 1071 East 16th Street, Chico, CA 95928 for your Grades K-8 program.

***FINAL OFFER***

**Teaching and Non-Teaching Space Offered**

***Chapman Elementary School Campus***

CUSD offers the Chapman Elementary School Campus on a shared use basis. The campus is located at 1071 E. 16th Street, Chico, CA 95928. The campus is on approximately 9.72 acres. The total square footage of CUSD-owned buildings being offered to you on the campus is approximately 8,250 sq. ft. and contains the following:

Non-Shared Space

1. 6 regular classrooms
2. 1 classroom for special education students
3. 1 classroom for an administrative area
4. Restrooms for students

Shared Space

Sherwood will also be sharing a multiuse room, library and grounds with Chapman Elementary School. As stated in your letter, Sherwood no longer requires the use of staff restrooms; therefore, they have been deleted from the shared space. Based on the number of classrooms needed by Sherwood, the classrooms currently containing non-essential services will be eliminated in order to accommodate regular classrooms for CUSD students.

+Shared space will be based on a percentage calculation as follows:

| | |
|---|---|
| 96.47 | Sherwood Projected ADA |
| 247.30 | Chapman Elementary School Projected ADA |
| 343.77 | Total ADA |

28.06 Percent total time allocated to the use of share facilities

Based on the maximum number of instructional minutes for your K-8 program, this equates to approximately 50 minutes per day for each shared facility. Parking will be based on the current 137 parking spaces, allowing 38 for the use by Sherwood.

Negotiations will continue to be needed regarding staggered starting and ending times for school, recess times, lunch periods, ingress and egress to the campus, supervision of Sherwood students versus Chapman Elementary School students, identification of Sherwood staff and students versus Chapman Elementary School staff and students, etc.

Relative to Nutrition Services, CUSD will continue to serve Sherwood students through the National School Lunch Program.

**Use or Surrender of Facilities**

CUSD, in accordance with Title 5, §11969.9(f), places the following condition on Sherwood's use and occupation of the facilities offered herein: In the event that Sherwood fails to regularly use and occupy all of the facilities (including but not limited to classroom space, specialized teaching space, and non-teaching space) by September 30, 2022, CUSD reserves the right to reclaim possession, and the right of occupation, of said unused facilities. CUSD shall provide five (5) days notice before reclaiming possession of any unused facility. There shall not be any opportunity to cure after the afore-referenced expiration date.

**Charges**

As allowed by Education Code §47613(b), CUSD intends to offer the facilities to Sherwood for free. We also intend to charge for the actual costs of supervisorial oversight of Sherwood not to exceed 3%.

We look forward to meeting with you to update and execute the Facilities Use Agreement currently in place.

Sincerely,

Julia M. Kistle

Julie Kistle
Director, Facilities and Construction

Enclosures

cc: Jaclyn Kruger, Assistant Superintendent, Business Services
Tina Keene, Director, State and Federal Programs
Kelly Staley, Superintendent

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Instructional Staff Report**

**Date:** April 21, 2022

---

***Instructional Staff was asked to respond to the question*:** *What are you hoping to accomplish next year?*

**Transitional Kindergarten/Kindergarten -Teresa Shippen**

April has always been a time of reflection for me. At this time of the year I really see the Kinder students beginning to outgrow their Kindergarten environment, and show readiness for the step into Lower El. As this happens, my focus turns to thinking about next year. What can I carry over that worked well? What areas can I improve on? I spend time reflecting with the students as well. It feels like we've taken a long journey together and I appreciate hearing their feedback. It is also a time to prepare the TK students for their role as our future Kindergarten students. All of this produces many goals, both large and small for the upcoming school year.

As I look at 2022-2023 and the possibility of growing our Kindergarten program my priority is very clear. I want to develop a strong Kindergarten team. I would like to spend some time collaborating with those that will be working with our kinder students to coordinate our efforts and in this process strengthen the curriculum. I am hoping we can all bring together our strengths and interests to provide enrichment to these younger students, that was so sorely missing during our Covid years. I am grateful to know of these possible changes early so we can all have time to prepare. My goal is to have a solid team and plan in place before the start of next year.

A big part of this goal is to bring parents on as team members. Covid has made it difficult to include parents in our classrooms, but as the restrictions subside I look forward to welcoming parents into our classrooms again. In the TK/ K grades this can bring much added support to new readers, drivers for field trips, bring new cultural experiences to the classroom and help for bigger projects. It also serves to help parents understand what happens in a Montessori classroom. Parent volunteers can then help others to better understand the program, and encourage others to find ways to become involved in our community. Teamwork and community will be the central theme as I look to next year.

**1st/2nd -Kim Powers**

Firstly, I'd like to say that this year has been one of many accomplishments. This was our first full year of in-person learning out of the past several years. I have to give the kids kudos for rolling with so many changes and new expectations from what they had grown accustomed to prior to now. I know that there are students who are going through this year as their first real school experience, and there are probably some who couldn't tell you what it was really like when they were in school before. We have all had so much to learn, and our students have accomplished so much academically and in understanding how to be in a school community. It has been challenging but rewarding. I am hoping that the work the teachers have put in this year will pay off next year with a group of students who will understand expectations for how to be – grow, thrive, communicate - in our school community. It felt like this took a long time to establish this school year.

I have not really thought much about what I'd like to accomplish next year, yet. I'm still really focused on this year right now. I feel like I accomplished a lot this year that I would like to continue to practice next year and feel really confident about. For example, I want to continue to progress in the Nurtured Heart Approach, with the Sherwood version of PBIS, with the SEL Toolbox program, and with math curriculums that we have been introduced to. I also always want to accomplish at least one year's worth of academic growth in each of my students. I always want to accomplish setting up firm routines and boundaries at the beginning of the school year as it will serve the class as a good foundation for the rest of the school year. I am looking forward to next school year and both the new and routine things that will come along with it.

**1st/2nd/3rd -Marlo Knox**

This board report is written to answer the prompt our director shared with us; What are you hoping to accomplish next year? It's a wonderful time to address the board, in the middle of parent/teacher spring conferences, when one has the pleasure to sit down with families and reflect on how far each child has come since our last formal conference in October 2021. Easy answer to the above question, I hope to continue to grow young humans in all aspects of their development.

Reflecting deeper, again based on recent experience, the Endangered Earth Event and paper packed puppet making specifically, I hope to continue to rebuild some of what has been lost since school closures in March 2020 due to the pandemic. In the 2022/2023 school year I hope to re-educate myself to our charter, comparing that to what is currently available in our greater Chico community, calendaring those events in advance and working towards making them happen. I feel like the time is right, now at the end of this year, moving forward into a bright future, to reestablish a classroom culture healthily interdependent on family volunteers while still fostering a growing independence in our children. I want to take our foundational commitment to 50 hours of volunteerism a year per family as important and worthy of attention, training, and my facilitation.

Finally, I am always attracted to and strive towards unity, relationship, and consistency. I am

obsessed with my exceptional instructional assistant, Joy Duggan. I constantly think about securing her and keeping her as my instructional assistant in the coming school year. In my opinion, we have formed a strong team working together for nearly two academic years. Unfortunately, I know she is destined and prepared for continued development, growing further in her skills as an educator. She is also deserving of financial compensation that would reflect her education, experience, and dedication are appreciated, important, vital. But, if all those things can not be provided by continuing on as my instructional assistant could it be provided at Sherwood if she became a staff member in another capacity, a position above her current position or rank? I'm hoping we, Sherwood Montessori, would be wise enough, creative enough, to find places to keep excellent staff such as Joy Duggan in the 2022/2023 school year.

As always, thank you for the opportunity to share my thoughts freely with the board. Thank you for your service to our school.

**1st/2nd /3rd -Anne Adams**
Hello, Board Members,

Since you asked, here are some of the things I'd like to accomplish next year:

**Further Integrate students' creativity with lessons; further develop a classroom culture of "follow-up work."**
Though my current students have made progress in both focus and creativity separately, it's been in fits and starts, and isn't yet the fully-integrated model I'd like to offer.

In a flourishing Montessori classroom, students use long-term handwork projects like knitting or embroidery as productive fidgets while they listen to lessons and stories. And when the teacher finishes giving a lesson, the teacher offers ideas of "follow-up" projects (including art projects) that students might like to try to celebrate and synthesize what they've just learned, for instance: "We've just learned about plants' different leaf shapes. Do you have a favorite leaf shape? Maybe you'd like to draw a picture of a plant that grows those leaves. Could you make a plant out of paper? How about cardboard? Could you knit or weave a leaf shape? Maybe you'd like to write a play or a story about the leaf shapes."

So far, my classroom hasn't quite gotten to that level, but I'm hopeful that next year I can more fully integrate work-period accountability with creative choice. I want a classroom culture where students use their creativity on the topics we study, not just between them.

**Give students more opportunities to lead, teach, and master skills together.**
The dream is to have a Montessori classroom where students take pride in sharing their knowledge with others. So far, we're about halfway there in my classroom, and moving gradually in the right direction. Next year, I hope we can fully realize that dream.

Right now, some of the productive atmosphere in my classroom has come courtesy of my "game-ification" of certain learning materials. The students have become obsessed with the cardstock punch cards I use to track their completion of sequential materials. Individuals are

driven to “earn stars” for themselves, but a few remain reluctant to help each other advance, or just chill out and learn about other topics that aren’t connected to the “star punch” system. I will continue to try to build students’ awareness of each other as resources for mutual skill practice and learning, not just people to beat in a game. I’ll also try to raise their appreciation for learning for its own sake, irrespective of any prize.

**Continue offering accessible computer-adaptive Independent Study**
About a week ago, I was able to obtain a subscription to IXL, an online learning platform aligned with California State Standards. I’d been wanting this for a while, and finally got it coordinated and activated, and because it’s sold as a year-long subscription, it should remain active for the same students throughout the summer.

Two of my most frequently absent students have used their IXL so far...and they seem to love it. Just today, one child spent 5 hours practicing, and the other almost 3. I’m impressed by these results, and I feel confident that this skill practice will improve the confidence and competence of these struggling kids. Of course, it’s no substitute for an in-person Montessori education, but if they’re not going to attend enough to receive that, it’s much, much more pinpointed than a worksheet packet.

| [redacted] | 664 questions | 2 hr 51 min | Practiced today |
|---|---|---|---|
| 1st (V.2) Match analog clocks and times 5FJ | 33 | 8 min | 0 99 |
| 1st (V.1) Match digital clocks and times KKM | 16 | 1 min | 0 100 |
| 1st (Q.7) Measure length with objects GWG | 6 | 2 min | 0 31 |
| 2nd (OO.2) Find the words with related meanings C65 | 8 | 4 min | 0 60 |
| 2nd (KK.1) Sort words into categories DRQ | 24 | 20 min | 0 95 |
| 1st (EE.2) Compare pictures using adjectives KDN | 33 | 3 min | 0 100 |
| 1st (M.4) Match the short e and long e words to pictures BS2 | 26 | 5 min | 0 100 |
| 1st (H.5) Complete the subtraction sentence - up to 10 J6J | 14 | 4 min | 0 81 |
| 2nd (F.13) Complete the subtraction sentence - up to 18 QS5 | 3 | <1 min | 0 19 |
| 1st (W.6) Square corners YSG | 23 | 3 min | 0 73 |
| 2nd (H.1) Subtract multiples of 10 2Q6 | 4 | <1 min | 0 36 |
| 2nd (F.8) Subtract a one-digit number from a two-digit num... HSU | 34 | 19 min | 0 99 |
| 1st (B.1) How many syllables does the word have? 75Z | 72 | 12 min | 0 100 |
| 1st (B.2) Sort by the number of syllables X7C | 12 | 5 min | 0 55 |
| 1st (R.1) Put two syllables together to create a word: easier ATP | 23 | 5 min | 0 100 |
| 1st (H.1) Choose the picture that matches the short e word CDT | 24 | 2 min | 0 100 |
| 1st (L.1) Identify the short vowel sound in a word NZK | 17 | 3 min | 0 79 |
| 1st (L.2) Complete the word with the right short vowel KGL | 22 | 5 min | 0 80 |
| K (E.2) Which word has more syllables? CQH | 11 | 1 min | 0 63 |
| K (F.) Which word has the same ending? 29K | 14 | 1 min | 0 100 |
| 3rd (V.1) Identify equal parts FHY | 52 | 4 min | 0 100 |
| 2nd (A.1) How many syllables does the word have? BX6 | 4 | 1 min | 0 18 |
| 1st (K.1) Choose the picture that matches the short u word VKE | 33 | 3 min | 0 100 |
| K (K.2) Choose the picture that matches the short e word XGG | 24 | 1 min | 0 100 |
| 1st (OO.4) Choose the correct possessive pronoun 8ZJ | 24 | 4 min | 0 100 |
| 1st (JJ.1) Use words with prefixes and suffixes MRW | 54 | 22 min | 0 100 |
| 3rd (E.2) Identify multiplication expressions for equal groups 9AE | 28 | 5 min | 0 100 |
| Real-Time Diagnostic (116 questions answered) | | | See Action Plan >> |
| 3rd (E.1) Count equal groups 9K7 | 26 | 15 min | 0 100 |

I'm sure there are many more things I could refine and retool in my teaching next year, but in summary, I look forward to further progress bringing us closer to the high standards we hold for a quality Montessori education.

**4th /5th/6th -Jessi Lusardi**

The short answer is I am not sure. Michelle has been very transparent with me about enrollment for next year, and I am appreciative of her time and honesty. I am glad that Teresa suggested a committee of teachers to take a look at how we can plan proactively for enrollment, and look forward to collaborating with them. If I am able to stay in the 4/5/6 classroom, there are a few things below I would like to do:

–I would like to adopt a curriculum for Upper Elementary that is aligned with state standards for Science and History, with a teachers edition and reading resources that I can use. Since October I have been using a combination of materials in order to teach standards. These include Reading A-Z, Teachers Pay Teachers, current events articles from websites like National Geographic, and other activities that I have in my personal teacher stash. These materials are great for supplementary content, and I feel confident in my ability to match reading materials and activities to standards. However, I feel strongly that if Sherwood wants teachers to deliver content that matches state standards, they must provide teachers with resources that match state standards. In addition, having to search to find materials each week for each subject takes a lot of time away from being able to innovate or provide scaffolded lessons to those students who are working above or below grade level.

**Sheng modeled a way that we can teach both Montessori activities and a curriculum that is aligned with state standards. She started to organize math curriculum binders that had both Montessori activities, and Go Math practice sheets for each of the standards she was teaching in 4th, 5th and 6th grade. I will continue with this model in the classroom if I teach 4/5/6 next year.

–Find a way to utilize the background and experience I have in creating science and outdoor education curriculum. I have been a mentor with the Inland Northern Science Project through the Chico State Center for Math and Science for over 2 years. This semester, I am working with 3rd-5th grade teachers throughout Northern Ca to help them develop NGSS aligned lesson plans. This week, I spent time after school giving resources and advice to a teacher at Parkview, on how to best organize and create an extension lesson on desalination plants for her GATE science class. I was able to pull lessons from a 9-unit science curriculum I created a few years ago to help her. I wonder if I could offer the same mentoring to teachers at Sherwood.

–Go on more field trips.

–Think about what sustainability means for the middle school. How and where do we recruit? Do we need a strong focus for our ⅞ program? What is our marketing plan?

–Do something interesting with the 2,000 square feet of gardening space we have at 1010. I just went to a workshop at Chico State where I learned about native plants from a member of the Mechoopda tribe. There are some really cool native plants we could have in our school garden that would help students learn about native plants. I have also reached out to the UC Davis master gardener program, and they have a program here in Chico and a display garden at Patrick Ranch. I would love to figure out how to partner with the Master Gardener program so they can come and give lessons to our students, and advice on what to plant. I also have ideas about outdoor play spaces, like the one they have at the Cal Academy of Sciences, which foster emotional health.

–Continue to ask the question: Are we a school that has a primary focus on special needs, behaviorally or academically? Nearly ½ of my class has special academic, social, or behavioral needs. A pattern that I have seen since coming to Sherwood is that I spend more of my time teaching behaviors and basic classroom procedures than teaching content. If this is the direction

that Sherwood is going in, I think it should be embraced. Get teachers professional development focused on scaffolding lessons, change our behavior system, beef up the staff in the learning center, and incorporate some social emotional curriculum that the whole school can get behind.

**4th /5th /6th-April Pearce**

**7th/8th-Michael Whittemore**

Next year one of my goals I want to accomplish would be to develop interactive curriculum that builds in multiple subject areas that will interconnect with each other through community projects.

**Learning Center-Happy Yasko**

What has happened this year has had a great impact on what I hope next year to be. This was the 1st year of semi-standard in person teaching for the whole day. I have tried and introduced many different strategies to try and gauge what works and what appears to not work. It is important for me to make sure I am looking at the successes and or not success with the proper glasses. This hasn't been the best example of what to expect next year. For many of my students this is either their 1st experience with any school, or a very different environment than what they remember. I find it important to keep that perspective because what didn't have the success I was hoping for may be due to the newness of coming back to school.

The best glimpse for me to start building on is the fact that I am seeing students who have been struggling starting to turn the corner. That is a huge positive in my mind. I have had the pleasure of introducing the SIPPS (Systematic Instruction in Phonological Awareness, Phonics, and Sight Words) program towards the 2nd have of this year and am very excited at the results I have been getting. Getting more organized using it will be a big priority going into next year. I got to spend a lot of time experimenting with all the different components of this plan and am starting to get a more streamlined approach to it now. It will always be evolving to meet the many different needs of my special kiddos. I am grateful for the fact that it can evolve according to their particular needs of support.

Next year I would like to start a program that supports our younger students in Math more. I am amazed even now about certain abilities that some possess in strategies that don't always surface when they are doing math. Just today one of our future leaders blew me out of the water with how well he can do a rather difficult stream of math processes that are needed to solve the problem. He made my day, come to think of it, many of my students have had great moments of success lately. I love my job.

The bottom line, I hope I can impact some of these amazing students in a way they start or continue realizing how amazing they are next year.

**MTSS-Molly Makel**

1. **Increase Literacy Particularly Among Lower EL Students**
   -More robust, school-wide uniform reading program (such as SIPPS), to compliment Montessori methods

2. **Continue to Implement and Refine a School-Wide PBIS Program**
   -agree to a program that combines nurtured heart, restorative practices, and PBIS (I feel our PBIS team did a great job of this at our last meeting)
   -Provide more training for staff
   -Have regular meetings with a behaviorist and possibly including them as IEP team members with certain students

3. **Increase Math Literacy** (but this might need to wait until the following year, because too many goals can cause us to not meet any of them)
   Ways we might do that include:
   -uniform school-wide curriculum (such as Houghton Mifflin) to compliment Montessori materials
   -math intervention push-in or pull-out specialist

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** April 21, 2022

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**Administrative**

- Updated enrollment will be reported at the meeting.
- Tina Keene, Director of State and Federal Programs at CUSD and Charise Bromley, Director of Fiscal Services at CUSD visited Sherwood for the annual visit for charter authorizers. We discussed data included in the Spring Reflections report that is submitted by all charters. The reports will be reported to the CUSD Board on May 18th.
- Teachers attended a training titled *Montessori By Any Means Necessary* which explored themes of culture and race and the meaning of anti-bias work in a Montessori school.
- We are continuing school tours once or twice a month for parents interested in enrolling in the school.
- We are currently seeking a new School Psychologist for the 2022-2023 school year. We are not anticipating needing to hire any other credentialed staff for next year.
- Brenda Brown and I have begun planning for a summer school program. The program will be offered free of charge for six weeks, three in June and three in July.
- The LCAP Focus Group had a productive meeting, and surveys for the community and for students were developed. These are now open, and responses are being collected.
- Our school counselor has been interviewing interns for the 2022-2023 school year to assist in implementing the wellness program that has been so successful this year. Interns from the School of Social Work at California State University, Chico will support the program and allow it to expand.
- There was a Town Hall on the evening of April 5th that included discussion of: the ways that the school seeks input, school initiatives to carry into the 2022-2023 school year, class configurations and enrollment for the 2022-2023 school year, opportunities for involvement, and an open forum.
- Teacher Kim Powers and I attended the annual Mount Lassen Mathematics Council conference on Saturday, April 2nd. The conference was again held virtually, and the presenters and content were excellent.
- Spring Parent/Teacher Conferences were held in early April.
- Our PBIS (Positive Behavior Interventions and Supports) Team has been discussing how to shift our PBIS program to a more humanist approach with a goal of developing relationships to support the human potential as opposed to a behaviorist approach with a goal of compliance. Some sources for humanist methodology include: the Nurtured Heart Approach, Positive

Discipline, and Restorative Practices.

**Safety**

- We continue to have a small number of staff and students who opt to wear face coverings at school. There have been very few requests for COVID tests in the last month.

**Legislative/Legal/Compliance**

- Pat and I met again with our consultant for questions and answers about Title 1 and other federal funds we are receiving or have received.
- Quarterly Federal Stimulus Reporting was completed.

# SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Treasurer's Report**

**Date:** April 21, 2022 Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of March 2022 reconciled with and matched those of the school's internal reports. The New Balance totaled $838,482.60 as of March 31, 2022 for the checking account and $50,000 in the special account which will moved back to the checking account once the contract work at 1010 Cleveland is signed off by the county.
- There were no unexpected high-cost expenses in March.

Profit & Loss

- The March Profit & Loss report shows a Net Income of -$89,586 and a YTD of -$330,426, which is offset by March LCF funds totaling $ 13,850 deposited in April along with Grant funds of $10,000 for ELOP, plus $9,410.06 in Lottery funds.

Cash Flow

- Assuming all Federally allocated funds are received and P1 is at least 100 ADA, the school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Balance Sheet - Current Month
**Accrual Basis** — **As of March 31, 2022**

| | Mar 31, 22 |
|---|---|
| **ASSETS** | |
| **Current Assets** | |
| **Checking/Savings** | |
| **9100-Assets** | 808,400 |
| **Total Checking/Savings** | 808,400 |
| **Accounts Receivable** | |
| **9200-Accounts Receivable** | 5,338 |
| **Total Accounts Receivable** | 5,338 |
| **Other Current Assets** | |
| **9290 - Due from Grantor Govts.** | -48,746 |
| **9340-Security Deposit** | 50,000 |
| **Undeposited Funds** | 16,015 |
| **Total Other Current Assets** | 17,269 |
| **Total Current Assets** | 831,008 |
| **Fixed Assets** | |
| **9410 - Land** | 95,000 |
| **9430- Building** | 182,515 |
| **9435-Accumulated Depreciation** | -21,786 |
| **Total Fixed Assets** | 255,729 |
| **TOTAL ASSETS** | **1,086,737** |
| **LIABILITIES & EQUITY** | |
| **Liabilities** | |
| **Current Liabilities** | |
| **Accounts Payable** | |
| **9500-Accounts Payable** | 242 |
| **Total Accounts Payable** | 242 |
| **Credit Cards** | |
| **SHERWOOD COSTCO VISA** | 3,825 |
| **Total Credit Cards** | 3,825 |

| | Mar 31, 22 |
|---|---|
| Other Current Liabilities | |
| 9500-Liabilities | 202,679 |
| Total Other Current Liabilities | 202,679 |
| Total Current Liabilities | 206,745 |
| Total Liabilities | 206,745 |
| Equity | |
| Restricted Assets | 364,551 |
| Unassigned/Unaapproriated | 845,867 |
| Net Income | -330,426 |
| Total Equity | 879,992 |
| TOTAL LIABILITIES & EQUITY | 1,086,737 |

# Sherwood Montessori
## Profit & Loss YTD Comparison
March 2022

| | Mar 22 | Jul '21 - Mar 22 |
|---|---|---|
| **Ordinary Income/Expense** | | |
| **Income** | | |
| **8000-Revenues** | 64,429 | 1,039,821 |
| **Total Income** | 64,429 | 1,039,821 |
| **Gross Profit** | 64,429 | 1,039,821 |
| **Expense** | | |
| **1000 Certificated Salaries** | 57,933 | 475,833 |
| **2000 Classified Salaries** | 40,175 | 345,385 |
| **3000-Employee Benefits** | 28,299 | 255,599 |
| **4000-Books and Supplies** | 2,971 | 69,034 |
| **5000 Services/Other Op. Exp.** | 24,638 | 224,397 |
| **Total Expense** | 154,016 | 1,370,248 |
| **Net Ordinary Income** | -89,586 | -330,426 |
| **Net Income** | **-89,586** | **-330,426** |

# Sherwood Montessori
## Board of Directors - Vendor Payments Report
## March 2022

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 03/01/2022 | DBT | Amazon.com | Masks | Instructional Supplies | 64.34 |
| Check | 03/01/2022 | DBT | Amazon.com | Growth mindset book -5 | Instructional Supplies | 60.75 |
| Check | 03/01/2022 | DBT | Amazon.com | Ruled paper and purple ... | Instructional Supplies | 33.55 |
| Check | 03/01/2022 | 9369 | CUSD | 2021 FUA - INV 22-00090 | CUSD FUA Charges | 1,982.11 |
| Check | 03/01/2022 | EFT | Comcast 4454 | FEBRUARY-MARCH S... | Internet Service Provid... | 228.55 |
| Check | 03/03/2022 | ACH | CharterSAFE | 21-22 P&L PREMIUM 8 | 5400-Liability Insurance | 2,641.00 |
| Check | 03/03/2022 | ACH | CharterSAFE | WC PREMIUM 8 | 3601-Workers Comp | 751.00 |
| Check | 03/03/2022 | DBT | Indeed | Ad for job position | Advertising | 44.72 |
| Check | 03/03/2022 | DBT | Amazon.com | Masks | Instructional Supplies | 64.34 |
| Check | 03/03/2022 | DBT | Amazon.com | Pencils, Post-it notes | Instructional Supplies | 31.90 |
| Check | 03/04/2022 | DBT | LA COCINA | The Upper L Team mee... | Food - Meetings | 52.07 |
| Check | 03/04/2022 | 9370 | Chico Country Day | NATALIE WREN - NUR... | Contracted Service | 1,242.47 |
| Check | 03/04/2022 | 9371 | Kellie Sutterfield | Monthly pesticide service | Pest Control | 85.00 |
| Check | 03/05/2022 | DBT | Amazon.com | Paper cups, flying dish t... | Instructional Supplies | 31.08 |
| Check | 03/05/2022 | DBT | Amazon.com | Art easel, magnetic letters | Instructional Supplies | 89.00 |
| Check | 03/06/2022 | 9367 | Captain Killion | Lawn services | Other | 901.80 |
| Check | 03/07/2022 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Check | 03/07/2022 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Check | 03/07/2022 | DBT | ARCO PUMPPASS | Gas cards | Contracted Service | 100.00 |
| Check | 03/07/2022 | DBT | Costco | Snacks | Food (Instructional) | 327.66 |
| Check | 03/07/2022 | DBT | Office Depot | Supplies | Office Supplies | 99.44 |
| Check | 03/07/2022 | DBT | Facebook Ads | RM | Advertising | 1.25 |
| Check | 03/08/2022 | DBT | Costco | HP OJ 8028 E | Computers and Electr... | 193.04 |
| Check | 03/09/2022 | 9372 | Advanced Document | Contract usage charge | Copier Lease | 783.70 |
| Check | 03/09/2022 | 9373 | Molly Makel | Velcro | Instructional Supplies | 43.66 |
| Check | 03/09/2022 | 9374 | Barbara Mandelbaum | Federal funding allocation | Grant Services | 75.00 |
| Check | 03/09/2022 | 9375 | Richard Hirshen | 2/17 5.5 x $35 = $192.50 | Contracted Service | 192.50 |
| Check | 03/09/2022 | 9377 | Laura Romano LMFT, ... | Classroom observation | Contracted Service | 1,120.00 |
| Check | 03/09/2022 | 9378 | Christine Mac Shane | Onsite art field trip | Contracted Service | 150.00 |
| Check | 03/09/2022 | 9379 | Susan Estes | Livescan | LiveScan and TB Test ... | 64.00 |
| Check | 03/09/2022 | 9380 | Oregon Shakespeare F... | -Deposit tickets | Ashland Trip | 180.00 |
| Check | 03/09/2022 | EFT | California Water Servic... | FEB SERVICE | Water | 38.92 |
| Check | 03/09/2022 | DBT | Amazon.com | Play dough, fuse beading | Instructional Supplies | 49.19 |
| Check | 03/09/2022 | DBT | Amazon.com | Plastic storage containers | LCAP | 187.78 |
| Check | 03/10/2022 | DBT | TEA BAR CAFE | Meal for staff training - ... | LCAP | 92.20 |
| Check | 03/11/2022 | DBT | US Chef'Store | Brooms and cups | Instructional Supplies | 33.13 |
| Check | 03/14/2022 | DBT | HP LEASE 7603 | Lease Payment - Custo... | HP DIRECT LEASE | 316.21 |
| Check | 03/14/2022 | DBT | USPS | Mailing | Postage | 1.76 |
| Check | 03/14/2022 | 9381 | CUSD | 2021 FUA - INV 22-00123 | CUSD FUA Charges | 1,466.49 |
| Check | 03/14/2022 | 9383 | Hernandez Cleaning Se... | INV 30478 | Housekeeping Services | 4,500.00 |
| Check | 03/14/2022 | EFT | Waste Management | February - SERVICE | Trash/Recycling | 128.68 |
| Check | 03/14/2022 | EFT | Laura Swanson {Other} | Puzzles | Instructional Supplies | 44.43 |
| Check | 03/15/2022 | ACH | COSTCO VISA CARD | FEB-MAR 2022 15TH P... | SHERWOOD COSTC... | 508.24 |
| Check | 03/17/2022 | DBT | Wufoo | MARCH SERVICE | Online List Management | 19.00 |
| Check | 03/18/2022 | 9376 | Richard Hirshen | Food for class | Contracted Service | 72.83 |
| Check | 03/21/2022 | DBT | Costco | Snacks | Instructional Supplies | 510.17 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 03/21/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conf... | 100.00 |
| Check | 03/21/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conf... | 100.00 |
| Check | 03/21/2022 | DBT | Amazon.com | Round teacher stamp - ... | LCAP | 9.98 |
| Check | 03/21/2022 | DBT | Amazon.com | RM | Instructional Supplies | 24.66 |
| Check | 03/23/2022 | DBT | USPS | Mailing | Postage | 21.15 |
| Check | 03/23/2022 | DBT | Office Depot | Tape and erasers | Office Supplies | 63.45 |
| Check | 03/23/2022 | DBT | Amazon.com | MONTHLY FEE | Kitchen and garden | 13.93 |
| Check | 03/24/2022 | DBT | Amazon.com | Laser Brother Fax Mach... | Computers and Electr... | 214.49 |
| Check | 03/25/2022 | DBT | Amazon.com | Work gloves | Kitchen and garden | 17.15 |
| Check | 03/25/2022 | DBT | Costco | Snacks for pizza PBIS p... | LCAP | 43.88 |
| Check | 03/25/2022 | DBT | Costco | Pizza for pizza PBIS party | LCAP | 53.36 |
| Check | 03/25/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conf... | 100.00 |
| Check | 03/25/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conf... | 100.00 |
| Check | 03/25/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conf... | 100.00 |
| Check | 03/25/2022 | 9384 | North State Parent Mag... | INV-72130 | Advertising | 435.00 |
| Check | 03/25/2022 | 9385 | Macquarie Equipment ... | Kyocera Copier Lease - ... | Copier Lease | 220.94 |
| Check | 03/25/2022 | 9386 | Anna Meeham [Other] | Graduating gift cards | Instructional Supplies | 27.00 |
| Check | 03/25/2022 | 9388 | Voltage Specialist | Annual NFPA Fire Alar... | Contracted Service | 980.00 |
| Check | 03/25/2022 | 9389 | Sarah Kane [Other] | Livescan | LiveScan and TB Test ... | 64.00 |
| Check | 03/25/2022 | 9390 | Brian Maciel [Other] | Livescan | LiveScan and TB Test ... | 64.00 |
| Check | 03/25/2022 | EFT | Comcast Business 9110 | FEBRUARY-MARCH | Internet Service Provid... | 308.93 |
| Check | 03/25/2022 | EFT | PG & E | March service | Electricity | 494.64 |
| Check | 03/25/2022 | EFT | Verizon Wireless | March Service | Telephone, Cellular | 99.91 |
| Check | 03/28/2022 | DBT | Amazon.com | Soft beaded jumprope | LCAP | 11.79 |
| Check | 03/28/2022 | DBT | Amazon.com | Inflatable playground ba... | LCAP | 59.96 |
| Check | 03/28/2022 | DBT | Amazon.com | Hula hoops | LCAP | 83.63 |
| Check | 03/29/2022 | DBT | Amazon.com | Work gloves | Kitchen and garden | 16.09 |
| Check | 03/29/2022 | DBT | Costco | Snacks | Instructional Supplies | 407.19 |
| Check | 03/29/2022 | DBT | Office Depot | Pens, paper, dry erase, ... | Office Supplies | 110.33 |
| Check | 03/31/2022 | DBT | BCOE-Cfte | Restorative conference... | Contracted Service | 80.00 |
| Check | 03/31/2022 | DBT | BCOE-Cfte | Restorative conference... | Contracted Service | 80.00 |
| Bill | 03/31/2022 | 20... | Pat Casey | MARCH 2022 CONTRA... | Business Manager Ser... | 4,000.00 |
| Check | 03/31/2022 | DBT | Amazon.com | RM | Instructional Supplies | 16.40 |
| Check | 03/31/2022 | | | Service Charge | Bank Fees | 27.00 |
| **TOTAL** | | | | | | **28,351.82** |

To:Board of Directors

From: Marta Taylor, SMPO Public Relations Coordinator
Subject: Sherwood Montessori Parents Organization

Report Date: April 21, 2022

Hello board, our last SMPO meeting was a success, compared to the last few meetings where no one would show up, we had parents joining and signing up for our events coming up.

Talking about events, our Cal skate night was so much fun, we skated, we laughed, It was awesome to reconnect as a community again. We raised $180.80 and we will be able to purchase more PE equipment!

We had our last restaurant takeover at Panda Express, we raised $98 and the funds of this fundraiser will go towards our kitchen and garden.

Next event is our variety show (4/29) . How fun! Besides enjoying all of our kiddos talents, we will also enjoy some pizza and bake sales. We already have many students signed up! All the money raised will help us fund our teacher appreciation day(5/3). We have a whole day planned for our amazing teachers, aides and all staff at Sherwood.

Lastly, bike to school day, hosted by our amazing PE teacher, Kimberly and Susi Maciel. They're in touch to have helmets and much more stuff to raffle for the big day!

That's all for the year, Board, thank you for everything you do for our school and children.

Best regards,

SMPO

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Enrollment and Class Configurations for 2022-2023 School Year**

**Date:** April 21, 2022

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**SUMMARY**

We currently have low enrollment for upper grades. A change in our class configurations for next year should be considered.

**DISCUSSION**

Typically, our middle school has seen boom and bust enrollment years. In some years, we have included the sixth grade with middle school to address this fluctuating enrollment. We have communicated the possible change to 4th-8th grade families and asked for input on the model. The topic was also discussed at the April 5th Town Hall meeting.

Our use of facilities is also a consideration, as is our intention to grow enrollment from the youngest students by going back to two TK/K classrooms. A committee of teachers will be meeting to give input and suggest possible configurations.

**ACTION REQUESTED**

Discuss model.

**Attachments**: Enrollment Numbers Table, Announcement to 4th-8th families, Enrollment Projections Table and Campus Map

With today's 2022-2023 enrollment:

| | | | | | |
|---|---|---|---|---|---|
| TK | 4 | 20 | 20 | 2 classrooms, room for growth | 3 credentialed teachers |
| K | 16 | | | | 1 instructional aide |
| 1 | 9 | 48 | 24 | 2 classrooms, little room for growth | 2 credentialed teachers |
| 2 | 17 | | | | 2 instructional aides |
| 3 | 22 | | 24 | | |
| 4 | 12 | 35 | 18 | 2 classrooms, room for growth | 3 credentialed teachers 1 instructional aide |
| 5 | 13 | | | | |
| 6 | 9 | | 17 | | |
| 7 | 0 | | | | |
| 8 | 1 | | | | |
| | 103 | | | 6 classrooms | |

With 2 more students at each level:

| | | | | | |
|---|---|---|---|---|---|
| TK | 6 | 24 | 12/12 | 2 classrooms, room for growth | 2 credentialed teachers |
| K | 18 | | | | 2 instructional aides |
| 1 | 11 | 54 | 18 | 3 classrooms, room for growth | 3 credentialed teachers |
| 2 | 19 | | 18 | | 3 instructional aides |
| 3 | 24 | | 18 | | |
| 4 | 14 | 45 | 23 | 2 classrooms, room for growth | 3 credentialed teachers 1 instructional aide |
| 5 | 15 | | | | |
| 6 | 11 | | 22 | | |
| 7 | 2 | | | | |
| 8 | 3 | | | | |
| | 123 | | | 7 classrooms | |

6th grade placement

Dear Parents and Guardians of Upper Grades Students,

I wanted to reach out to you all with information about plans for next year's grades 4-8 program. My intention is to give you all accurate information to help you all make the best decision for your students and families going forward.

As you may be aware, enrollment in California public schools has been in decline since the COVID pandemic created a shift to distance learning. Because we finalize a budget and staffing model in May the year before, this current year's model was based on small class sizes with the idea that we would be better prepared for social distancing. Even once social distancing was no longer a recommendation, the small class sizes allowed teachers to focus on individualizing and accelerating students' learning.

For this current year, we had 8 7th and 8th grade students in middle school, and two upper elementary classrooms capped at 20 4th, 5th and 6th graders. For next year, we are looking at one upper elementary classroom with 4th and 5th grade taught by April Pearce with 6th graders moving into the middle school taught by Michael Whittemore. Jessi Lusardi will be our science lab teacher for grades 4th-8th as well as the 6th grade math teacher. With this move, the middle school will still be small with 13 students, but we are focusing recruitment efforts to attract more students.

April, Michael and Jessi have been working closely together this year as a team and we are excited for all that they will be able to offer their students with this model. April is a fully trained Montessorian and has experience at these grade levels. Michael has been a part of the Sherwood middle school classroom since 2016, and has grown in his capacity from an instructional aide to a credentialed teacher. Jessi has shown her amazing capacity as a classroom teacher, and she is a leader in Butte County among science educators, having been selected as a county representative for science education development projects housed in the San Francisco Academy of Sciences. Our upper grades students have such a strong team of educators for next year that will be working together to give them a solid academic experience!

We welcome input from parents on this decision. To share your opinion, you can communicate with me via email at michelle@sherwoodmontessori.org or we can set up a meeting (in person, Zoom, or phone), or you are welcome to come to a Board of Directors meeting to speak during the Public Comments.

And please keep communication open about your plans for next year; we will not judge you or feel judged by your choices! By choosing Sherwood, you have already shown that you are discerning about your child's education, and we have much respect for that.

Thank you for your understanding on this complex issue, and for your patience in allowing us to make changes that will be the best decision for our school.

Michelle Yezbick

Director, Sherwood Montessori




Rooms 1,2,6&7 currently have one TK/K and 3 lower els (1st/2nd/3rd)

Room 3: Office

Rooms 4 & 5: upper els (4th/5th/6th)

Room 9: Learning Center

Room 10: Currently Extended Day, will go back to CUSD in 2022-2023

R=restrooms

*Science/art room and Library have restrooms in them

Enrollment tables used to negotiate Prop 39 space for 2022-2023:

| grades | 2021-2022 | total per level | #class-rooms | | 2022-2023 | total per level | #class-rooms | | 2023-2024 | total per level | #class-rooms |
|---|---|---|---|---|---|---|---|---|---|---|---|
| TK | 14 | | | | 20 | | | | 20 | | |
| K | 7 | 21 | 1 | | 20 | 40 | 2 | | 20 | 40 | 2 |
| lower el 1 | 19 | | | | 8 | | | | 20 | | |
| 2 | 21 | | | | 19 | | | | 8 | | |
| 3 | 11 | 51 | 3 | | 21 | 48 | 2 | | 19 | 47 | 2 |
| upper el 4 | 13 | | | | 12 | | | | 21 | | |
| 5 | 14 | | | | 13 | | | | 12 | | |
| 6 | 10 | 37 | 2 | | 14 | 39 | 2 | | 13 | 46 | 2 |
| middle 7 | 2 | | | | 10 | | | | 14 | | |
| school 8 | 6 | 8 | 1 | | 2 | 12 | 1 | | 10 | 24 | 1 |
| Total | 117 | 117 | 7 | | 139 | 139 | 7 | | 157 | | 7 |

# SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, May 19, 2022 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**B. CONSENT AGENDA** (6:05)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, April 28, 2022.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6:20)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.2 School Director Report**

**E.2.3 Treasurer Report**

**E.3 Action Items** (6:30)

**E.3.1 Universal Prekindergarten Planning and Implementation Grant**

The Board will be asked to approve a plan for UPK at Sherwood.

**Action Requested:** Approve plan.

**E.3.2 Local Control Accountability Plan (LCAP)**

The Board will be asked to discuss the LCAP draft and allow for public input.

**Action Requested:** Discuss plan.

**F. CLOSED SESSION** (6:55)

**F.1 Public Employee Performance Evaluation**

With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director.

**G. FUTURE AGENDA ITEMS** (7:15)

The Board will be asked to adopt the 2022-2023 Local Control Accountability Plan (LCAP).

**H. ADJOURNMENT** (7:20)

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SHERWOOD MONTESSORI

**REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, April 21, 2022 – 6:00 p.m.**

## MINUTES

### A. CALL TO ORDER

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*Meeting called to order by Russell Shapiro at 6:06 PM with Beth Hammer, Robyn Howley in attendance, Dan LaBar joined at 6:12 PM, and Karey Cooper was absent.*

### B. CONSENT AGENDA

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, March 24, 2021.
**B.2 Middle School Field Trip** Consider approval of field trip to Shakespeare Festival in Ashland, Oregon.
**B.3 Acceptance of Prop 39 Offer of Facilities** Consider accepting the offer of facilities from CUSD.

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

*Consent agenda reviewed by Russell Shapiro, discussion followed. Beth Hammer motioned to approve, seconded by Robyn Howley with unanimous approval of present Board members.*

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA**

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS**

**E.1 Items Removed from Consent (If any)**

*None*

**E.2 Reports and Communications**

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 Instructional Staff Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**
**E.2.4 SMPO Report**
**E.2.5 Chair Report**

*Michelle Yezbick provided Instructional Staff Report and presented School Director Report. Pat Caey provided Treasurer Report. Marta Taylo presented SMPO Report. Discussion followed. Russell Shapiro discussed upcoming Board elections.*

**E.3 Action Items**

**E.3.1 Enrollment and Class Configurations**

The Board will be asked to discuss the model for class configurations for the 2022-2023 school year.

**Action Requested:** Discuss 2022-2023 class configurations.

*Michelle Yezbick presented Enrollment and Class Configurations for the 2022-2023 school year. Discussion followed.*

**F. CLOSED SESSION**

*Russell Shapiro adjourned public meeting at 6:56 PM. Closed session began.*

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**F.1 Public Employee Performance Evaluation**

With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director.

**G. FUTURE AGENDA ITEMS**

The Board will be asked to discuss the 2022-2023 Local Control Accountability Plan (LCAP) and adopt the LCAP at a subsequent meeting before June 30. The Board will receive an update on Board Elections.

**H. ADJOURNMENT**

*Russell Shapiro adjourned closed session at 7:33 PM*

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** May 19, 2022

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**Administrative**

- Updated enrollment will be reported at the meeting.
- Teachers attended a training presented by Jenna Johnson, MSW , a clinical social worker/therapist titled *Conversations for Caring Professionals*. She introduced techniques for self-regulation for use by teachers and strategies for working with students who are dysregulated.
- We've had two school tours this month for parents interested in enrolling in the school.
- We are still seeking a new School Psychologist for the 2022-2023 school year. We also have ads up for a new Director of MTSS and a teacher pool.
- End of year assessments have been conducted, make up tests are being administered. We are looking forward to when we can administer these assessments with decent internet as the lags have been difficult. A supply chain issue has pushed our e-Rate project back to July.
- Sherwood attended the Endangered Earth Event in the Chico City Plaza. It was a sweet event for students to show off their amazing puppets, but the attendance was significantly smaller than in years past.
- The Variety Show at the end of April was well-attended and a joyful event held at 1010 Cleveland. We have some talented students who show a great deal of comfort performing in front of a crowd!

**Safety**

- We have had a round of illness that is not related to Covid but has caused a number of staff and student absences. We have also had a small number of Covid cases in the school community in the month of May.

**Legislative/Legal/Compliance**

- Pat and I will attend the Capital Advisors Group's presentation on the May Revise next week. The early reports look good for the State budget for education.

# SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Treasurer's Report**

**Date:** May 19, 2022 Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of April 2022 reconciled with and matched those of the school's internal reports. The New Balance totaled $ 718,370.05 as of April 30, 2022 for the checking account and $50,000 in the special account which will moved back to the checking account once the contract work at 1010 Cleveland is signed off by the county.
- There were no unexpected high-cost expenses in March.

Profit & Loss

- The March Profit & Loss report shows a Net Income of -$132,980 and a YTD of -$463,370, which is offset by April LCF funds totaling $ 13,850 deposited in May along with State Grant funds of $10,000 for ELOP, plus $74,181 in Federal Grant funds.

Cash Flow

- Assuming all Federally allocated funds are received and P1 is at least 100 ADA, the school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Balance Sheet - Current Month
**Accrual Basis** — **As of April 30, 2022**

| | Apr 30, 22 |
|---|---|
| **ASSETS** | |
| **Current Assets** | |
| **Checking/Savings** | |
| **9100-Assets** | 679,144 |
| **Total Checking/Savings** | 679,144 |
| **Accounts Receivable** | |
| **9200-Accounts Receivable** | 10,677 |
| **Total Accounts Receivable** | 10,677 |
| **Other Current Assets** | |
| **9290 - Due from Grantor Govts.** | -52,656 |
| **9340-Security Deposit** | 50,000 |
| **Undeposited Funds** | 16,015 |
| **Total Other Current Assets** | 13,359 |
| **Total Current Assets** | 703,180 |
| **Fixed Assets** | |
| **9410 - Land** | 95,000 |
| **9430- Building** | 182,515 |
| **9435-Accumulated Depreciation** | -21,786 |
| **Total Fixed Assets** | 255,729 |
| **TOTAL ASSETS** | **958,909** |

| | Apr 30, 22 |
|---|---|
| **LIABILITIES & EQUITY** | |
| **Liabilities** | |
| **Current Liabilities** | |
| **Accounts Payable** | |
| **9500-Accounts Payable** | 242 |
| **Total Accounts Payable** | 242 |
| **Credit Cards** | |
| **SHERWOOD COSTCO VISA** | 1,345 |
| **Total Credit Cards** | 1,345 |
| **Other Current Liabilities** | |
| **9500-Liabilities** | 210,274 |
| **Total Other Current Liabilities** | 210,274 |
| **Total Current Liabilities** | 211,861 |
| **Total Liabilities** | 211,861 |
| **Equity** | |
| **Restricted Assets** | 364,551 |
| **Unassigned/Unappropriated** | 845,867 |
| **Net Income** | -463,370 |
| **Total Equity** | 747,048 |
| **TOTAL LIABILITIES & EQUITY** | **958,909** |

# Sherwood Montessori
## Profit & Loss YTD Comparison
April 2022

| | Apr 22 | Jul '21 - Apr 22 |
|---|---|---|
| **Ordinary Income/Expense** | | |
| **Income** | | |
| **8000-Revenues** | 35,061 | 1,074,882 |
| **Total Income** | 35,061 | 1,074,882 |
| **Gross Profit** | 35,061 | 1,074,882 |
| **Expense** | | |
| **1000 Certificated Salaries** | 57,855 | 533,688 |
| **2000 Classified Salaries** | 54,166 | 399,551 |
| **3000-Employee Benefits** | 30,618 | 286,217 |
| **4000-Books and Supplies** | 3,040 | 72,074 |
| **5000 Services/Other Op. Exp.** | 22,362 | 246,722 |
| **Total Expense** | 168,041 | 1,538,252 |
| **Net Ordinary Income** | -132,980 | -463,370 |
| **Net Income** | **-132,980** | **-463,370** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**April 2022**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 04/01/2022 | EFT | Heather Fisher | Mileage | 5200-Travel and Conferences | 28.78 |
| Check | 04/01/2022 | EFT | Heather Fisher | Facebook Boost | Contracted Service | 10.00 |
| Check | 04/01/2022 | 9395 | Kellie Sutterfield | Monthly pesticide service (Green... | Pest Control | 85.00 |
| Check | 04/01/2022 | 9396 | David Durosier | Haitian dance lessons - Feb/Mar... | Contracted Service | 2,800.00 |
| Check | 04/01/2022 | EFT | Comcast 4454 | MARCH-APRIL SERVICE | Internet Service Provider | 228.55 |
| Check | 04/01/2022 | EFT | HSA Bank | MARCH 2022 | HSA - K. POWERS | 100.00 |
| Check | 04/01/2022 | 9394 | Comcast Ethernet | March Service-2742 | Ethernet - Fiberoptic | 281.54 |
| Check | 04/01/2022 | EFT | California Water Service Comp... | FEB-MAR Service | Water | 43.31 |
| Check | 04/01/2022 | DBT | USPS | Stamps | Postage | 58.00 |
| Check | 04/01/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 50.00 |
| Check | 04/01/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 50.00 |
| Check | 04/01/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 100.00 |
| Check | 04/01/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 100.00 |
| Check | 04/04/2022 | 9397 | Advanced Document | MARCH SERVICE | Copier Lease | 438.73 |
| Check | 04/04/2022 | 9398 | Office Depot | SUPPLIES | Office Supplies | 99.44 |
| Check | 04/04/2022 | 9399 | Barbara Mandelbaum | Federal funding allocation | Grant Services | 130.00 |
| Check | 04/04/2022 | 9400 | Captain Killion | Lawn services | Other | 172.50 |
| Check | 04/04/2022 | 9400 | Captain Killion | Materials | Maintenance Supplies | 48.53 |
| Check | 04/04/2022 | DBT | Amazon.com | White cardstock | Office Supplies | 7.50 |
| Check | 04/04/2022 | DBT | Indeed | Ad for job position | Advertising | 59.90 |
| Check | 04/05/2022 | 9387 | Oregon Shakespeare Festival | Ticket balance | Ashland Trip | 875.00 |
| Check | 04/05/2022 | 9401 | JOY DUGGAN | Aquarium Supplies | Instructional Supplies | 43.95 |
| Check | 04/05/2022 | DBT | Pearson Clinical Assessment | Learning Center SpEd | 4100-Textbooks/Core Curricula | 8.40 |
| Check | 04/05/2022 | DBT | Office Depot | Office supplies | Office Supplies | 76.33 |
| Check | 04/05/2022 | DBT | Costco | SNACKS | Food (Instructional) | 311.77 |
| Check | 04/05/2022 | DBT | Facebook Ads | RM | Advertising | 9.62 |
| Check | 04/06/2022 | DBT | TERRAIN PARK CLIMBING C... | FIELD TRIP - LCAP | Field Trips and Assemblies | 288.00 |
| Check | 04/07/2022 | 9393 | CHICO MONTESSORI CHILD... | WALK-A-THON FUNDRAISER AD | Advertising | 75.00 |
| Check | 04/07/2022 | DBT | FoodMaxx | Snacks | Food (Instructional) | 26.34 |
| Check | 04/07/2022 | DBT | The Creative Apple | Red/blue 100 sheets | Instructional Supplies | 8.54 |
| Check | 04/07/2022 | DBT | Amazon.com | Storage organizer | Office Supplies | 42.44 |
| Check | 04/08/2022 | 9403 | Richard Hirshen | Food for class | Contracted Service | 246.27 |
| Check | 04/08/2022 | 9404 | CUSD | 2021 FUA - INV 22-00140 | CUSD FUA Charges | 2,260.96 |
| Check | 04/08/2022 | 9405 | Hernandez Cleaning Service | INV 47432 | Housekeeping Services | 4,500.00 |
| Check | 04/08/2022 | 9407 | Maia Illa, LCSW | Supervision-Swanson | Contracted Service | 320.00 |
| Check | 04/08/2022 | DBT | BEC'S ENVIRONMENTAL NE... | Ad | Advertising | 35.00 |
| Check | 04/11/2022 | 9406 | Richard Hirshen | Teaching Service | Contracted Service | 822.50 |
| Check | 04/11/2022 | DBT | Costco | 9 OZ CUPS | Office Supplies | 12.86 |
| Check | 04/11/2022 | DBT | Office Depot | SUPPLIES | Office Supplies | 37.82 |
| Check | 04/11/2022 | DBT | Growing up Chico | Business card ad | Advertising | 200.00 |
| Check | 04/11/2022 | DBT | Costco | SNACKS | Food (Instructional) | 347.19 |
| Check | 04/11/2022 | DBT | Costco | Returned fax machine | Computers and Electronics | -193.04 |
| Check | 04/12/2022 | 9408 | Comcast Ethernet | April Service-2742 | Ethernet - Fiberoptic | 278.04 |
| Check | 04/12/2022 | 9409 | IXL | Math, Language arts, Science, A... | 5300-Dues and Membership | 449.00 |
| Check | 04/12/2022 | 9410 | Mount Lassen Math Council | 2022 virtual conference | 5200-Travel and Conferences | 40.00 |
| Check | 04/12/2022 | EFT | Comcast Business 9110 | APRIL-MAY Service | Internet Service Provider | 308.83 |
| Check | 04/12/2022 | EFT | Laura Swanson {Other} | Therapy Supplies | Instructional Supplies | 19.59 |
| Check | 04/12/2022 | EFT | Waste Management | March-Service | Trash/Recycling | 128.68 |
| Check | 04/12/2022 | DBT | TEA BAR CAFE | Meal for staff training - PBIS | LCAP | 75.99 |
| Check | 04/13/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 25.00 |
| Check | 04/13/2022 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 25.00 |
| Check | 04/13/2022 | DBT | Amazon.com | Lost teeth saver necklace organi... | Office Supplies | 21.42 |
| Check | 04/13/2022 | DBT | Amazon.com | Instant shelter canopy | Office Supplies | 174.73 |
| Check | 04/14/2022 | 9402 | Chico Country Day | NATALIE WREN - NURSE -Inv ... | Contracted Service | 926.18 |
| Check | 04/14/2022 | ACH | CharterSAFE | 21-22 P&L PREMIUM 8 | 5400-Liability Insurance | 2,641.00 |
| Check | 04/14/2022 | ACH | CharterSAFE | WC PREMIUM 8 | 3601-Workers Comp | 751.00 |
| Check | 04/14/2022 | EFT | COSTCO VISA CARD | 2022 15TH PURCHASES MAR-... | SHERWOOD COSTCO VISA | 2,480.19 |
| Check | 04/16/2022 | DBT | Amazon.com | Stickers packs | Instructional Supplies | 14.90 |
| Check | 04/16/2022 | DBT | Amazon.com | Sticker packs | Instructional Supplies | 8.14 |
| Check | 04/18/2022 | DBT | Wufoo | APRIL SERVICE | Online List Management | 19.00 |
| Check | 04/19/2022 | 7307 | Southern Oregon University | housing | Field Trips and Assemblies | 200.00 |
| Check | 04/19/2022 | DBT | Amazon.com | WATER SPRINKLER-GARDEN ... | Instructional Supplies | 159.78 |
| Check | 04/19/2022 | DBT | Costco | SNACKS | Food (Instructional) | 437.66 |
| Check | 04/19/2022 | DBT | SIGNS AND GRAPHICS | GRAPHICS-SIGN | Advertising | 1,000.00 |
| Check | 04/20/2022 | 9411 | Marta Taylor {other} | Pizza-SMPO | Food (Instructional) | 45.23 |
| Check | 04/20/2022 | 9411 | Marta Taylor {other} | Popcorn-Cider | Food (Instructional) | 38.97 |
| Check | 04/20/2022 | 9412 | Macquarie Equipment Capital I... | Kyocera Copier Lease - INV 255... | Copier Lease | 220.94 |
| Check | 04/20/2022 | EFT | Jessica Lusardi | Supplies | Instructional Supplies | 125.59 |
| Check | 04/20/2022 | EFT | Heather Fisher | Facebook Boost | Contracted Service | 58.33 |
| Check | 04/20/2022 | DBT | Amazon.com | SPONGES | Office Supplies | 10.71 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 04/20/2022 | 9414 | Office Depot | TAPE-STAPLER-PENCIL | Office Supplies | 37.82 |
| Check | 04/20/2022 | 9413 | Captain Killion | Lawn services | Other | 399.80 |
| Check | 04/20/2022 | 9413 | Captain Killion | Materials | Maintenance Supplies | 172.53 |
| Check | 04/20/2022 | EFT | Koren Clark Know Thy Self | Payment 2 of 2 | Contracted Service | 1,800.00 |
| Check | 04/20/2022 | EFT | PG & E | SERVICE 2022 APRIL | Electricity | 227.45 |
| Check | 04/20/2022 | DBT | SIGNS AND GRAPHICS | GRAPHICS-SIGN | Advertising | 409.89 |
| Check | 04/22/2022 | DBT | Office Depot | RINGED BOOK BINDER | Office Supplies | 24.43 |
| Check | 04/22/2022 | EFT | HP LEASE 7603 | Lease Payment - Customer ID 7... | HP DIRECT LEASE | 316.21 |
| Check | 04/22/2022 | EFT | Verizon Wireless | April service | Telephone, Cellular | 243.99 |
| Check | 04/22/2022 | 9415 | Chico Country Day | NATALIE WREN - NURSE -Inv ... | Contracted Service | 925.95 |
| Check | 04/25/2022 | DBT | THE SOCIAL EXPRESS | BRIGHTEN LEARNING | Instructional Supplies | 99.00 |
| Check | 04/25/2022 | 9416 | Steve Duke | SUPPLIES | Maintenance Supplies | 98.22 |
| Check | 04/25/2022 | 9417 | Christine Mac Shane | PAINTING CLASS 123M | Contracted Service | 300.00 |
| Check | 04/25/2022 | EFT | Laura Swanson {Other} | Therapy Supplies | Instructional Supplies | 24.01 |
| Check | 04/25/2022 | DBT | Amazon.com | Prime membership | Contracted Service | 16.08 |
| Check | 04/26/2022 | DBT | Amazon.com | BRITA FILTER | Office Supplies | 16.06 |
| Check | 04/26/2022 | DBT | Costco | SNACKS | Food (Instructional) | 407.92 |
| Check | 04/26/2022 | DBT | HobbyLobby | FLORAL | Instructional Supplies | 9.63 |
| Check | 04/26/2022 | DBT | Target | SUPPLIES | Instructional Supplies | 17.12 |
| Check | 04/26/2022 | DBT | THE SOCIAL EXPRESS | BRIGHTEN LEARNING | Instructional Supplies | 55.00 |
| Check | 04/28/2022 | DBT | Raley's | SIMPLY DONE BAMBOO | Custodial Supplies | 3.10 |
| Check | 04/29/2022 | DBT | Costco | Pizzas SMPO Event | Food - Meetings | 64.03 |
| Check | 04/29/2022 | DBT | Facebook Ads | AD - RM | Advertising | 25.00 |
| Bill | 04/30/2022 | 2021/... | Pat Casey | CONTRACTED SERVICE 2022 ... | Business Manager Services | 4,000.00 |
| Check | 04/30/2022 | | | Service Charge | Bank Fees | 27.00 |
| **TOTAL** | | | | | | **35,650.87** |

# Sherwood Montessori
## Board of Directors - Donations and Fundraising Report
### January through April 2022

| Type | Date | Memo | Amount |
|---|---|---|---|
| **8000-Revenues** | | | |
| **8600-8799 Other Local Revenue** | | | |
| **8699-Fundraising and Donations** | | | |
| **8699-Field Trip Donations** | | | |
| **Ashland Trip** | | | |
| Deposit | 03/11/2022 | Farmer's Market | 141 |
| Deposit | 03/11/2022 | Friend Grams | 261 |
| Deposit | 04/01/2022 | PAYPAL DONATION | 76 |
| Deposit | 04/21/2022 | MIDDLE SCHOOL FUNDRAISER | 504 |
| Total Ashland Trip | | | 982 |
| **8699-Field Trip Donations - Other** | | | |
| Deposit | 03/11/2022 | T-Shirt fundraiser | 256 |
| Total 8699-Field Trip Donations - Other | | | 256 |
| Total 8699-Field Trip Donations | | | 1,238 |
| **8699-Fundraising** | | | |
| **8673-Rebates** | | | |
| Deposit | 03/02/2022 | AMAZON SMILE | 13 |
| Total 8673-Rebates | | | 13 |
| **8699-Fundraising - Other** | | | |
| Deposit | 02/08/2022 | SMPO FUNDRAISER | 516 |
| Total 8699-Fundraising - Other | | | 516 |
| Total 8699-Fundraising | | | 529 |
| Total 8699-Fundraising and Donations | | | 1,768 |
| Total 8600-8799 Other Local Revenue | | | 1,768 |
| Total 8000-Revenues | | | 1,768 |
| **TOTAL** | | | **1,768** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Universal Prekindergarten Planning & Implementation Grant**

**Date:** May 19, 2022

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**SUMMARY**

Sherwood has been allocated $29,008.00 for the UPK Planning & Implementation Grant and can secure the funds if conditions are met, including adoption of a plan filled on the approved template.

**DISCUSSION**

Grant funds may be used for costs associated with creating or expanding TK programs to ensure that high-quality options for prekindergarten education are available for four-year-old children. Allowable costs include but are not limited to: (1) planning costs, (2) hiring and recruitment costs, (3) staff training and professional development, (4) classroom materials, and (5) supplies.

As a condition of receiving grant funds, state law requires each LEA to create a plan articulating how all children in the attendance area of the LEA will have access to full-day learning programs the year before kindergarten that meet the needs of parents.

Under state law, the plan must be developed for consideration by the LEA's governing board at a public meeting on or before June 30, 2022, after which the LEA must provide data, as specified by the State Superintendent of Public Instruction, to the CDE. The CDE must encumber funds by June 30, 2024. LEAs will have until June 30, 2025, to use the funds.

**ACTION REQUESTED**

Approve plan.

**Attachments**: UPK Planning and Implementation Grant Program-Planning Template

SHERWOOD MONTESSORI

# Universal Prekindergarten Planning and Implementation Grant Program

| LEA Name | Contact Name and Title of the Individual Self-Certifying the Statement Above | Email | Phone |
|---|---|---|---|
| Sherwood Montessori | Michelle Yezbick, Director | michelle@sherwoodmontessori.org | 530.345.6600 |

Sherwood Montessori is excited to offer the Montessori method of education to younger students with the expansion of Transitional Kindergarten. In the traditional Montessori model, classrooms include multiple age groupings of students to foster learning communities with a range of cognitive, physical, social-emotional, and academic opportunities. Sherwood's Pre-Kindergarten Vision will reflect the traditional Montessori method vision with a prepared environment that serves learners ages 4-6. Trained Montessori educators will guide students in their Transitional Kindergarten year alongside peers in their Kindergarten year. This two-year program will offer leadership and ownership opportunities for the students, as well as the benefits of having a familiar teacher and environment for those important early years of development.

1. Did the LEA develop a joint plan with multiple LEAs (for example, multiple small and rural LEAs serving similar communities or countywide plans developed with support of the COE for all LEAs in the county)?

No, the LEA will continue to operate as a single-site charter school with UPK included at the site.

SHERWOOD MONTESSORI

# Universal Prekindergarten Planning and Implementation Grant Program

## Focus Area A: Vision and Coherence

### Required Questions

1. Which of the following model(s) of service delivery does the LEA plan to implement for UPK for all four-year-old children, including classes fully inclusive of children with disabilities, to provide access to the least restrictive environment for learning?

TK and kindergarten combination classes

2. Does the LEA plan to implement full-day TK, part-day TK, or both?

Both, full day with an option for a part-day.

3. Describe how the model(s) of service delivery selected in the preceding two questions will be implemented across the LEA's sites and why.

Sherwood is a single-site LEA. The TK program will follow the full day Kindergarten schedule with the option for a half day. Parents and teachers will have input regarding the best way to serve the needs of individual children.

4. Does the LEA plan to begin operating a CSPP or expand its current CSPP contract?

No - the LEA has no plans to begin or expand a CSPP contract in future years

5. If the LEA answered yes in question four, what age of children does the LEA plan to serve through a CSPP contract?

N/A

6. Please indicate if the LEA plans to serve students eligible for early admittance TK, for children whose fifth birthday occurs after the enrollment date for the year of implementation (see implementation timeline above)?

a. 2022–23 (Birthdays February 3 or after)

Yes




# Universal Prekindergarten Planning and Implementation Grant Program

b. 2023–24 (Birthdays April 3 or after)

Yes

c. 2024–25 (Birthdays June 3 or after)

Yes

**Focus Area B: Community Engagement and Partnerships**

**Required Questions**

1. Identify which of the following opportunities the LEA implemented to obtain public input on the UPK Plan.

Direct family contact

Family or parent surveys

Special Education Local Plan Area (SELPA)

LCAP educational partners input sessions

Town Hall Meetings

Parent/teacher conferences

2. Select which programs the LEA plans to combine with the TK instructional day to offer a minimum of nine hours per day of programming (instructional day plus programming) for children whose families opt in for extended learning and care.

Expanded learning programs on an LEA site (ASES, 21st Century Community Learning Centers [21st CCLC], ELO-P)

SHERWOOD MONTESSORI

# Universal Prekindergarten Planning and Implementation Grant Program

## Focus Area C: Workforce Recruitment and Professional Learning

EC Section 48000(g)(4) specifies that credentialed teachers who are first assigned to a TK classroom after July 1, 2015, have, by August 1, 2023, one of the following:

a. At least 24 units in early childhood education, or childhood development, or both.
b. As determined by the LEA employing the teacher, professional experience in a classroom setting with preschool age children that is comparable to the 24 units of education described in subparagraph (a).
c. A Child Development Teacher Permit issued by the CTC.

EC Section 8295 specifies that teachers in CSPP shall either possess a permit issued by the CTC authorizing service in the care, development, and instruction of children in a child care and development program; or meet the following criteria:

a. Possess a current credential issued by the CTC authorizing teaching service in elementary school or a single subject credential in home economics; and
b. Possess twelve units in early childhood education or child development, or both, or two years' experience in early childhood education or a child care and development program.

## Required Questions

1. Which of the following strategies does the LEA intend to use to support diverse and effective prospective TK teachers, including multilingual educators, to earn a Multiple Subject Teaching Credential?

Partner with one or more local Institutions of higher education (IHEs) or the COE to help support teachers holding less than a full credential to complete requirements to earn a preliminary Multiple Subject Teaching Credential

Join an existing intern preparation program to recruit and prepare teachers for your LEA

Provide advising on credential requirements and options for how to meet these requirements

Partner with a COE to provide other services to candidates seeking to earn a multiple subject credential

SHERWOOD MONTESSORI

# Universal Prekindergarten Planning and Implementation Grant Program

2. Which of the following strategies does the LEA intend to employ to support diverse and effective prospective TK teachers, including multilingual educators, to meet the requirements under EC Section 48000(g)(4)?

Provide information on scholarship and grant opportunities

Provide advising on requirements and how to meet the requirements

Develop or work with an established mentorship program to support new TK teachers

3. Which of the following strategies does the LEA intend to employ to support diverse and effective prospective CSPP teachers, including multilingual educators, to obtain a Child Development Teacher Permit

None of the above, the LEA is not planning to support prospective CSPP educators in obtaining a Child Development Teacher Permit

4. On which child observational assessments does the LEA intend to offer professional learning to TK, CSPP, and other early education teachers during the 2022–23 school year? [select all that apply]

DERS: Developmental Environment Rating Scale, developed by the National Center for Montessori in the Public Sector (NCMPS).

5. On what topics does the LEA intend to offer professional learning regarding early childhood education to site leaders and principals? [select all that apply]

Children's social-emotional development (aligned with the California Preschool Learning Foundations and the California Preschool Curriculum Frameworks)

ACEs and trauma- and healing-informed practice

Implicit bias and culturally- and linguistically-responsive practice

Administration and use of child assessments to inform instruction

Engaging culturally- and linguistically-diverse families

Curriculum selection and implementation

SHERWOOD MONTESSORI

# Universal Prekindergarten Planning and Implementation Grant Program

**Focus Area D: Curriculum, Instruction, and Assessment**

**Required Questions**

1. Does the LEA plan to provide any of the following language model(s) for TK students?

   English-only instruction with home-language support

2. If the LEA administers CSPP, does it plan to provide any of the following language model(s) for CSPP students?

   Other [describe, open response]

3. Identify methods the LEA plans to use to support the development of social-emotional learning and executive function skills through specific instruction in these areas and by embedding and reinforcing this instruction in all curriculum areas. [select all that apply]

   Designing developmentally-appropriate learning environments to allow for individual and group activities that promote social-emotional learning and executive function skills (for example, use students' pictures or words in daily routines, feelings charts)

   Promote learning through play as a context for social and emotional development, including social play with teachers and peers in small or large group settings

   Use developmental observations to identify children's emerging skills and support their development through daily interactions

   Development of lesson plans or use of a curriculum that includes specific and targeted social-emotional learning and executive function activities throughout the day of instruction

   Offer open-ended, self-directed learning opportunities that foster individual interests and curiosity and new learning

   Staff development opportunities encouraging reflective practice and cross-level support for instruction specific to social-emotional learning and executive function skills

# Universal Prekindergarten Planning and Implementation Grant Program

4. What instructional practices does the LEA plan to implement to support children with disabilities in UPK programming?
   [select all that apply]

Provide adaptations to instructional materials

Provide additional staff to support participation in instruction

Implement Universal Design for Learning

Provide adaptations to instructional materials

Implement social-emotional strategies, such as the Pyramid Model, CSEFEL, and others

5. What assessments does the LEA plan to use in TK or kindergarten? [select all that apply]

LEA-based grade level benchmarks and a report card

Other [describe, open response]

## Focus Area E: LEA Facilities, Services, and Operations

### Required Questions

**CDE will be requiring this information be completed after the plan is presented to the governing board.**

1. To support an overall increase in UPK access, what efforts does the LEA plan to make to prevent the displacement of any early education programs on LEA campuses, including both LEA-administered and non-LEA-administered programs?

Sherwood is co-located on Chapman Elementary campus through Prop 39. Sherwood school leadership has met with Chico Unified School District representatives to examine enrollment data and facilities plans to ensure that both the traditional neighborhood school (Chapman) and the alternative methods charter school (Sherwood) is able to offer UPK programming to all area families.

SHERWOOD MONTESSORI

# Universal Prekindergarten Planning and Implementation Grant Program

2. Does the LEA have adequate classroom space to meet the Projected Enrollment of TK students listed in the Projected Enrollment and Needs Assessment section of this document, for the respective implementation year? [multiple choice]

Yes

i. If no, how many more classrooms does the LEA need? [identify number, open response]

N/A

ii. If no, how might the LEA provide classrooms in the timeframe needed? [describe, open response]

N/A

3. Does the space meet the kindergarten standards described in California Code of Regulations, Title 5, Section14030(h)(2)?

No

i. If no, what modifications need to be made? What resources are needed to make them? ( See Facilities Grant Program Funding at https://www.dgs.ca.gov/OPSC/Services/Page-Content/Office-of-Public-School-Construction-Services-List-Folder/Access-Full-Day-Kindergarten-Facilities-Grant-Program-Funding) [describe, open response]

Currently, the classrooms housing kindergarten do not include bathrooms. Modifications to the current classrooms to include bathrooms would need to be made, or the classrooms located on the adjacent property to the main campus which do have bathrooms could be used for the TK/K classrooms.

4. Does the space contain necessary adaptive equipment, assistive technology, or other accommodations to ensure children with disabilities have access to education in the least restrictive environment?

No

i. If no, what modifications need to be made? What resources are needed to provide equipment or accommodations?

Sherwood would need to purchase necessary equipment.

5. Does the LEA's Facilities Master Plan adequately address the need for UPK programming?

No

# Universal Prekindergarten Planning and Implementation Grant Program

i. If no, what process will the LEA use to update the Facilities Master Plan to accommodate future TK and early education programming?

Sherwood's main campus is located on Chapman Elementary campus and falls under the Chico Unified School District Facilities Master Plan.

6. In which of the following areas does the LEA intend to make updates to facilities?

None of the above: Sherwood does not own the facilties.

7. What transportation will the LEA offer to children enrolled in TK? [select all that apply]

No transportation will be provided

8. Will the LEA offer transportation to transport TK children to extended learning and care opportunities that are at other sites than the one the child is enrolled at for TK?

No transportation will be needed, the extended learning opportunities are available on the same site.

## Appendix - Definitions

The following definitions are critical for UPK planning efforts. Additional terms and definitions can be found in the Guidance Document:

- **Preschool through Third Grade (P–3):** P–3 is a continuum of learning from preschool through third grade that can be supported by intentional practices at the classroom, school, and leadership levels that align curricula, assessment, and professional learning opportunities to ensure instruction builds on the knowledge and skills that children acquire as they transition across grades and settings.
- **Universal prekindergarten (UPK):** UPK refers to universal TK as well as the expanded CSPP, Head Start, and early childhood special education services that families can choose from to create rich early learning opportunities for all three- and four-year-old children during the year or two years before kindergarten. In high-needs neighborhoods, the CDE strongly encourages LEAs to consider pairing TK programs with access to Head Start and CSPP for age- and income-eligible three- and four-year-old children to further bolster program quality, either through the LEA's own Head Start or CSPP program or via a contract partnership with a CBO that administers a Head Start or CSPP.
- **Transitional kindergarten (TK):** TK means the first year of a two-year kindergarten program, serving four-year-old children regardless of income that uses a modified kindergarten curriculum that is age- and developmentallyappropriate (EC Section 48000 [d]).
- **Universal transitional kindergarten (UTK):** UTK refers to the expansion of TK by 2025–26 to serve all four-yearold children by September 1 of each year, regardless of income, providing a year of rich learning opportunities the year before kindergarten that families can choose from as part of California's public education system.

SHERWOOD MONTESSORI

# Universal Prekindergarten Planning and Implementation Grant Program

- **California State Preschool Program (CSPP):** CSPP is the largest state-funded preschool program in the nation. CSPP includes both part-day and full-day services to eligible three- and four-year-old children. CSPP provides a core class curriculum that is developmentally, culturally, and linguistically appropriate for the children served. The program also provides meals and snacks to children, parent education, referrals to health and social services for families, and staff development opportunities to employees. The program is administered through LEAs, colleges, community-action agencies, local government entities, and private, nonprofit agencies.
- **Expanded learning:** This includes before school, after-school, summer, or intersession learning programs that focus on developing the academic, social, emotional, and physical needs and interests of pupils through handson, engaging learning experiences. It is the intent of the Legislature that expanded learning programs are pupilcentered, results-driven, include community partners, and complement, but do not replicate, learning activities in the regular school day and school year.
- **Expanded Learning Opportunities Program (ELO-P):** ELO-P provides funding for after-school and summer school enrichment programs for TK through sixth grade. The ELO-P is defined as services provided in addition to the normal school day and school year operations, to provide full-day and full-year expanded learning programs to meet the needs of working families whose children are enrolled in TK through sixth grade and also provide expanded learning enrichment programming for students. A full day is defined as in-person before school or afterschool expanded learning opportunities that, when added to daily instructional minutes, are no fewer than nine hours of combined instructional time and expanded learning opportunities per instructional day. A full year includes a minimum of 30 days of programming in the summer and intersession for no fewer than nine hours of in-person expanded learning opportunities per day.
- **Early learning and care:** This refers to the continuum of programs serving children from birth to preschool or school entry, as well as extended care to support school-age children with before school and after-school care as well as vacation schedules. This includes general child care, Early Head Start and Head Start, community-based early learning and care programs, family child care providers, and family, friend, and neighbor care.
- **Extended learning and care:** This refers to the continuum of programs and services (early learning and care options and expanded learning options) available in addition to the normal school day and school year operations, to provide full-day and full-year care to meet the needs of working families whose children are enrolled in TK or kindergarten. A full day is defined as in-person before school or after-school programming or care that, when added to daily instructional minutes, provide no fewer than nine hours of combined instructional time and expanded learning opportunities per instructional day. A full year includes a minimum of 30 days of programming in the summer and intersession for no fewer than nine hours of in-person expanded learning opportunities per day. Funding to support extended learning and care for children enrolled in TK includes the ELO-P and the CSPP, as specified in guidance provided by the CDE's Early Education Division. Additional subsidized care opportunities may be available to families who qualify, such as child care vouchers and the General Child Care School Age program.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Local Control Accountability Plan (LCAP) Draft**

**Date:** May 19, 2022

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**SUMMARY**

The LCAP adoption process should have ample opportunities for a variety of stakeholders to give input, including: students, parents, faculty, staff and community members.

**DISCUSSION**

The LCAP format includes a description of the process for engaging stakeholders to gain input. A focus group has met to discuss our current LCAP and the course for developing our future adoption. Including the LCAP as an item at our public meetings is also a required part of the adoption process to give opportunity for stakeholder input. Sherwood requests input from parents and guardians, teachers, and staff via an annual Community Survey. Students give input with a Student Survey. The draft attached here was created from survey input, data from the CDE Dashboard, local data, exit survey data, and input from the focus group.

**ACTION REQUESTED**

Discuss draft of LCAP and allow stakeholder input.

Attachments: LCAP Community Survey Report 2022, DRAFT LCAP 2022-2023

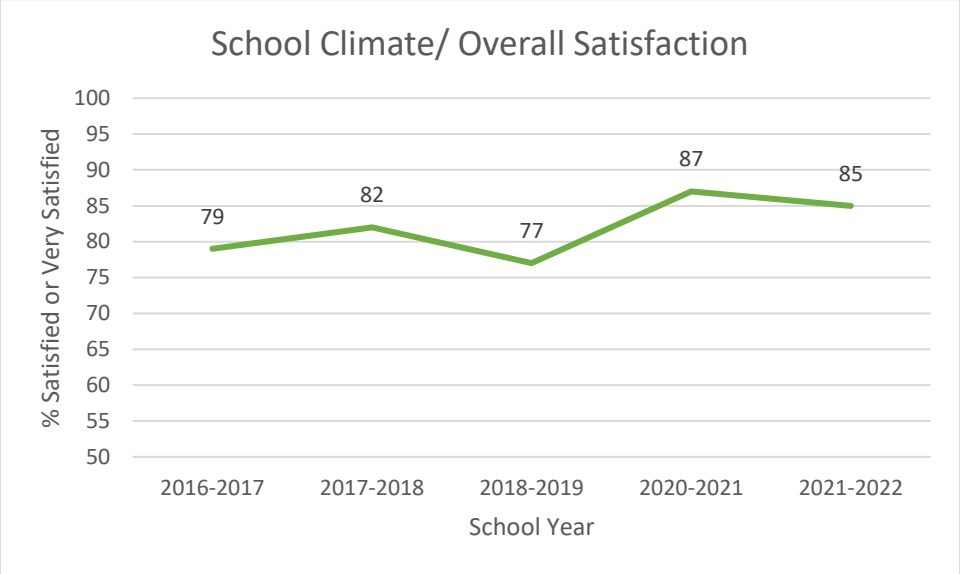


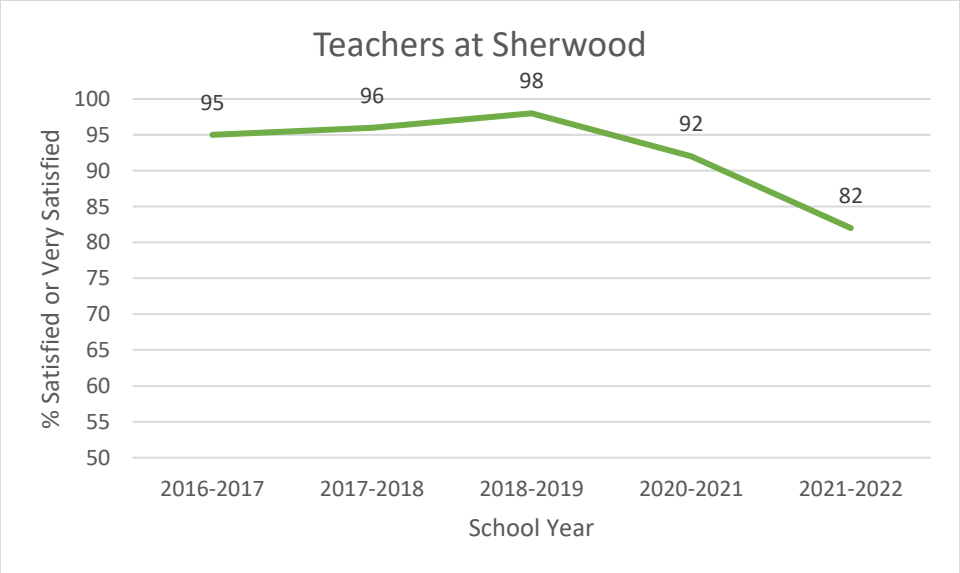

# LCAP Community Survey 2022

## SURVEY RESULTS AND MULTI-YEAR COMPARISON DATA

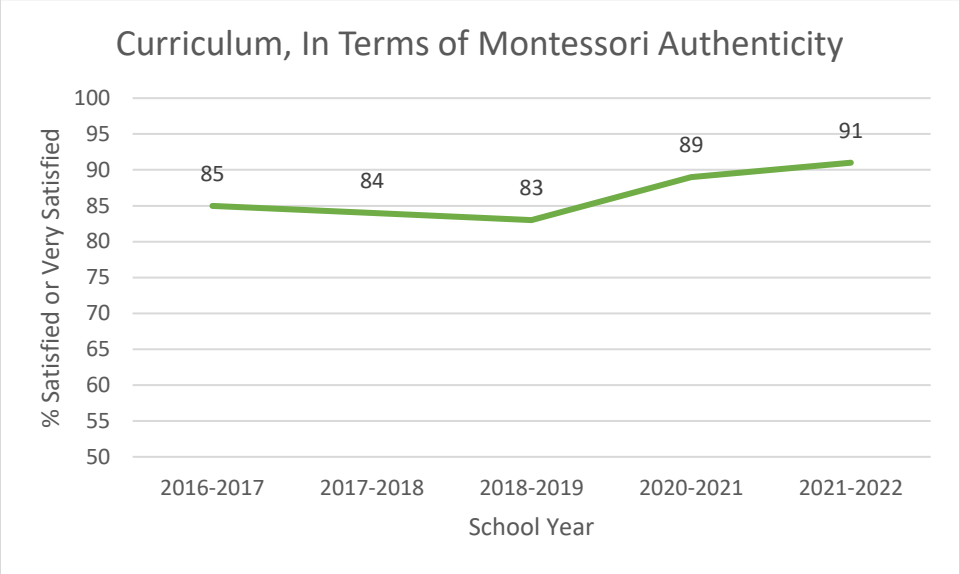
Michelle Yezbick ⌘ Director, Sherwood Montessori ⌘ May 19, 2022

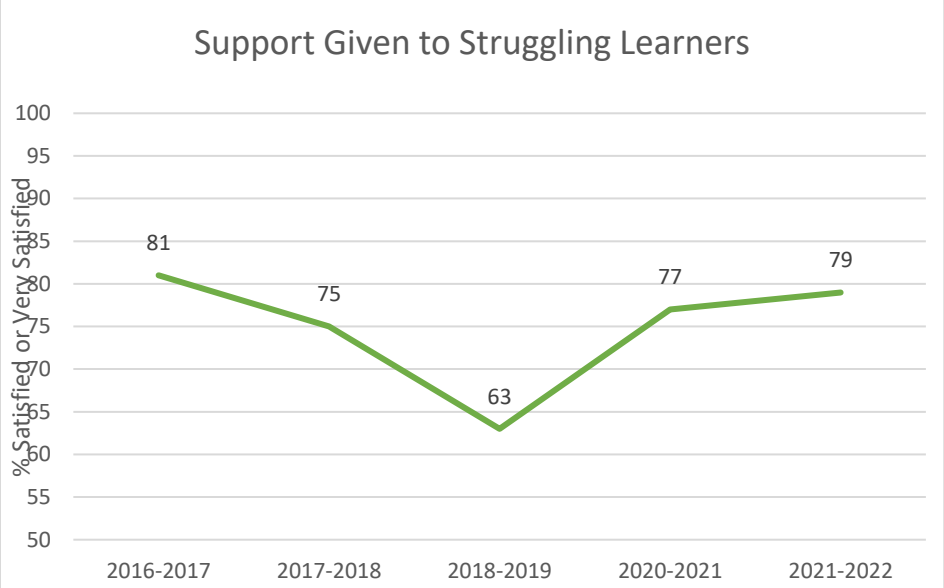
# Community Survey Multi-Year Comparison Graphs



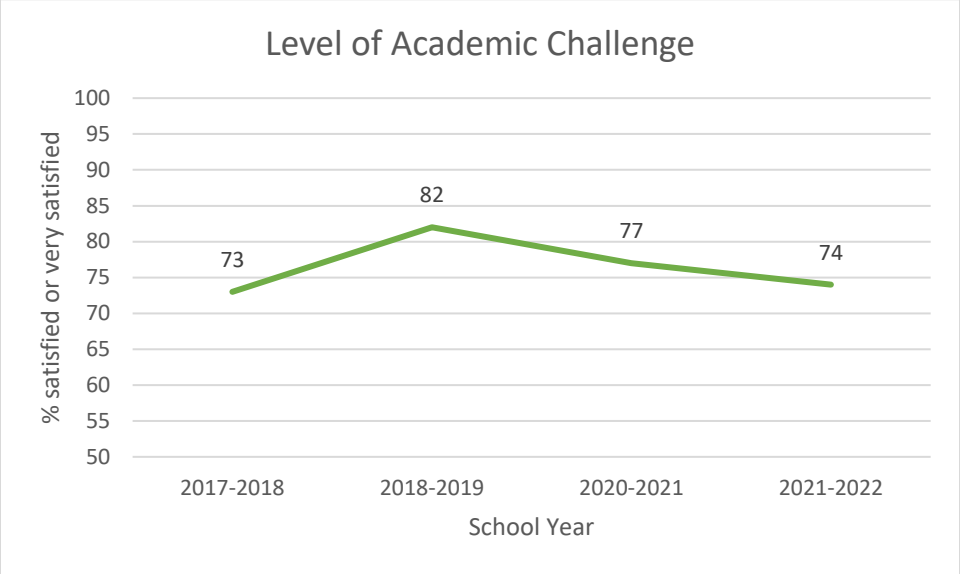



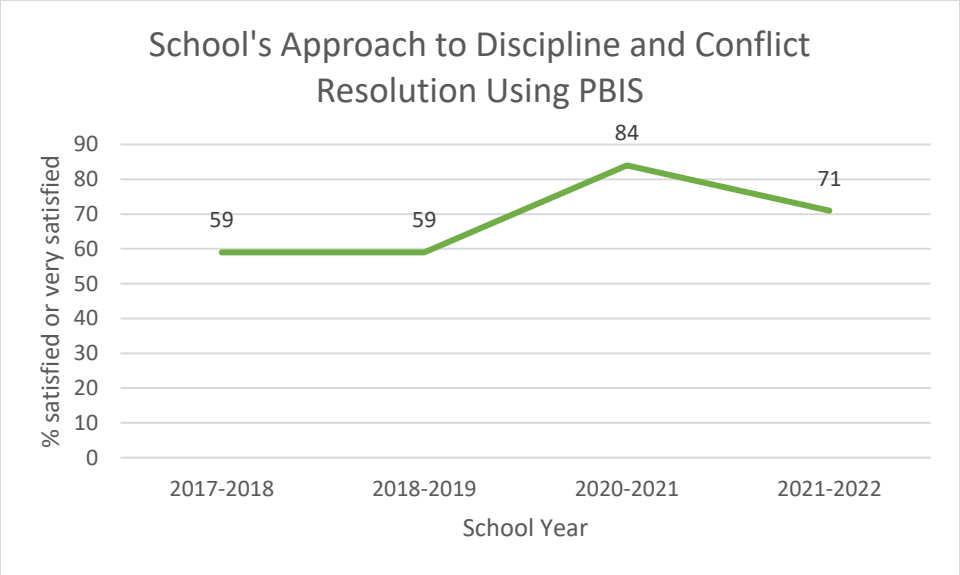
# Community Survey Multi-Year Comparison Graphs



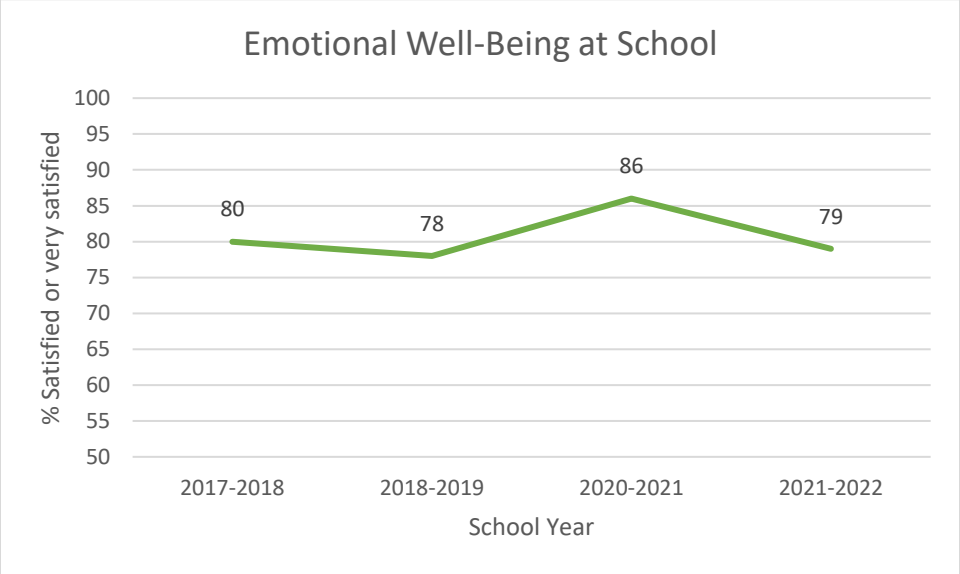



# Community Survey Multi-Year Comparison Graphs

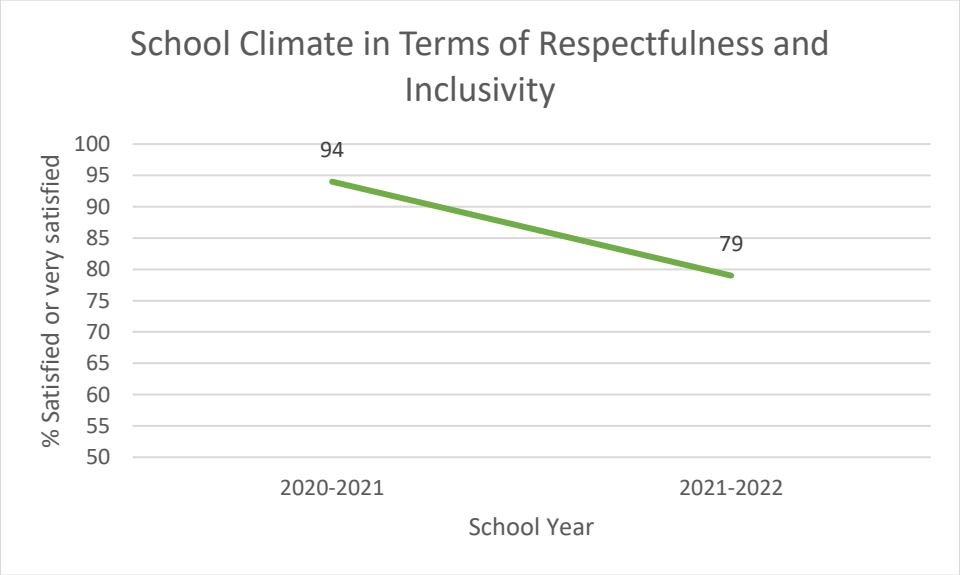


# Community Survey Multi-Year Comparison Graphs




Beginning 2020-2021 question was revised to read *Please rate your satisfaction with Sherwood in terms of: students' emotional well-being at school.* Prior years' question was *Please rate your satisfaction with Sherwood in terms of: students' emotional and physical well-being at school.*



# New Questions for the 2021-2022 School Year

*Please rate your satisfaction with Sherwood in general for each of the following:*

*Support for students who need academic challenge.* 74% Satisfied or very satisfied

*Opportunity by the school to make an impact in academic outcomes for my student/s.* 91% Satisfied or very satisfied

# Themes from the Narrative Responses

***If you have a complaint about school, are you likely to bring it up to a teacher, staff member, or administration?***

15 respondents said "Yes"

Other responses:

All, in that order

We were able to address most questions/concerns during the P/T conference - thanks to the school providing aftercare. Admin staff (Vanessa and Heather) are generally available and supportive.

No. If it's in the classroom, the teachers are great. But administration isn't as good.

teacher or administration

Teacher first. If no resolution, then I would approach administration.

All of the above because everyone helps everyone around here.

***If you answered no to the preceding question, what could we do to make you feel more comfortable voicing your concerns?***

Follow up on any complaint to make sure the parent is heard.

I will voice my concerns.

This survey is a good back-up to the aforementioned supports.

***We are always open to improving our program. Do you have any suggestions for ways the school could improve?***

Better middle school program. More staff for struggling students. Tailored PBIS system.

I would like to see science more strongly represented in all grade levels

Focus on retention. Word of mouth is the best way to grow. Check out The Ultimate Question for a better way to survey parents and grow the school through engaged and invested community members.

More academic rigor; better science equipment (e.g., actual labs).

I think you're doing a great job!

I would love to see the gardening program flourish as well as more emphasis on sustainability. I realize, for the most part, this may just be an issue of "capacity." I have considered ways I would like to support this as I build greater balance and capacity to do so for (and in partnership with) the school/community.

Number one, you should beautify the campus. There's no reason it should look as ugly as it does- since flowers and trees around the school could greatly improve it.

I love how hands on the school is. I wish there was a parent teacher orientation to understand all the rules of the school prior to enrolling, but it's easy catching on to how things run.

Personally I would like to see writing in the curriculum, spelling and english all being taught at a higher standard.

More hands on gardening

More sports opportunities would be appreciated.

Provide childcare at times you need parental involvement.

I'm sure it was likely due to covid, but this year was lacking in activities beyond the classroom.

I am so impressed as a parent with all staff and with how happy and fulfilled my child is!

Use staff training to discuss expectations, duties, goals, and team contribution so that everyone is aware of each other and their specific responsibilities and what resource they are to the team and community. Break down specific "examples" of challenges and what works, therefore, as a team, everyone can unanimously use the same fundamental procedures to reach success. This will help train new staff and subs along the way and introduce viable solutions for challenging experiences they may face one day or may avoid altogether.

I feel like communication has improved overall.  I feel like there has been alot of last minute planning this year compared to the times before covid but maybe those are high expectations.

**For any "less than satisfied" responses, can you please explain why?**

<u>Concerns about PBIS/Discipline</u>

Four statements about how PBIS is implemented at Sherwood.

<u>Academic Related Concerns</u>

Five statements about academics. Three expressing wanting more challenge, one expressing wanting more intervention, and one wanting consistent experience from one child/classroom to another in terms of implementing Montessori.

Other Statements

Two statements about the feeling of community lacking, one not liking Parent Square, one statement wondering why the school struggles so much, and one statement about programs not being set up for success or supported throughout the academic year.

# Exit Survey Responses 2021-2022

*Four online surveys were filled and one in-person interview was conducted.*

**Can you please tell us why you have chosen to leave Sherwood?**

Two responses about a bigger/better middle school experience.

One response about a lack of security on campus.

One response about health-related needs to be in homeschool during the pandemic.

Wanting a better special education program.

**Please share your input on your experience in the school, classroom, and Extended Day program (if applicable).**

Three statements of appreciation for the Extended Day program, including that it was free, best it's been so far.

One statement of appreciation for the three teachers and one aide that the student had had over the years.

One statement about the campus seeming to be lacking resources and teacher seemed overwhelmed.

**How was the personal attention your child received from her/his teacher and the quality of learning?**

Two statements about great growth in math and one about English level. A general statement of support. A statement about not getting a good response to concerns about lack of academic gain in reading.

**How was the responsiveness from the teacher, administration, and staff?**

Three positive statements: solid, all is/was good, always have been, everyone communicates efficiently with me.

One statement about a teacher being dismissive about lack of academic gain in reading.

Save as

**Can you please share your input about how you feel about the level of achievement your child has reached at Sherwood?**

One statement about child being at grade level and having great principles that Sherwood instilled. One statement about Montessori probably not being the best way for the child to learn. One statement about child doing great academically but not emotionally because child was scared/didn't feel safe. One statement with positive feedback about math and social learning but negative feedback about reading intervention.

**Can you please give input about our enrichment programs offered (cooking & gardening, PE, arts and electives)?**

One positive statement about gardening, one positive statement about cooking, one wishing there was PE everyday and more electives such as learning to play a musical instrument.

**Is there anything else you'd like to share?**

One expression of general gratitude and being given tools for success at the next school, one expression of needed security/ buzz-in system, one expression of wishing to return after the pandemic. One respondent had trouble with using Parent Square.

## Student Survey Responses

Students were asked to respond to the following statements:

1. I am happy to be a student at this school.

2. I get to do interesting activities at school.

3. I am learning a lot.

4. I feel I am part of the school community.

5. My teacher treats me with kindness and respect.

6. The aide and other adults at school treat me with kindness and respect.

7. The students treat me with kindness and respect.

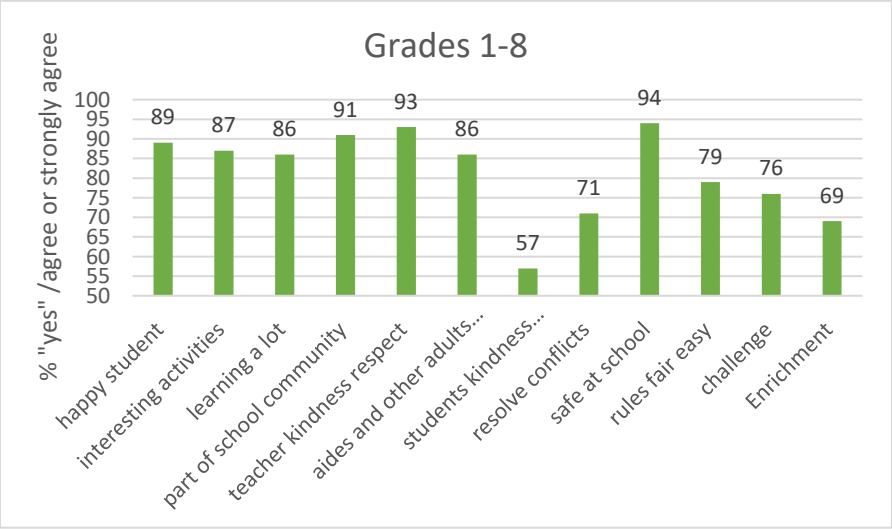
8. The school helps students resolve conflicts with each other.

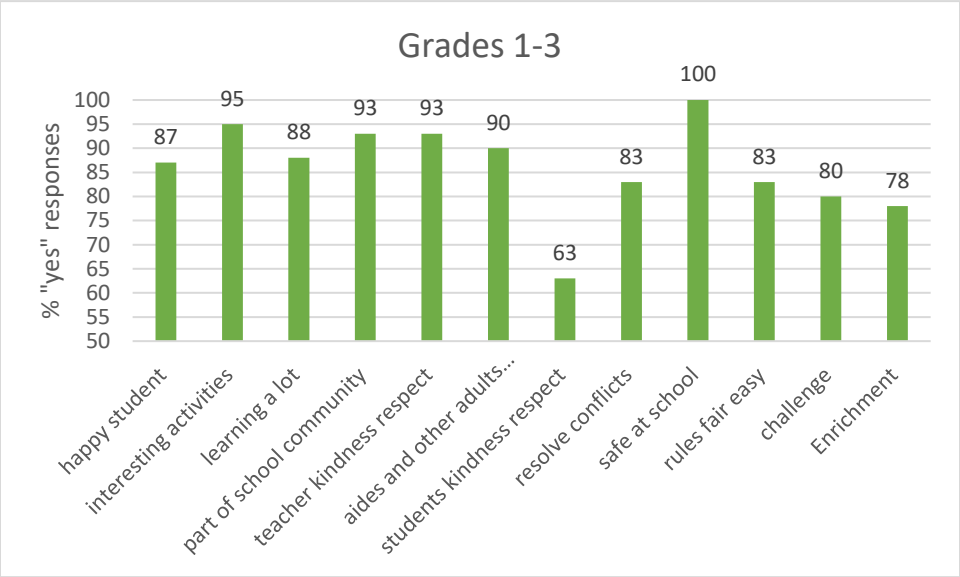
9. I feel safe at school.

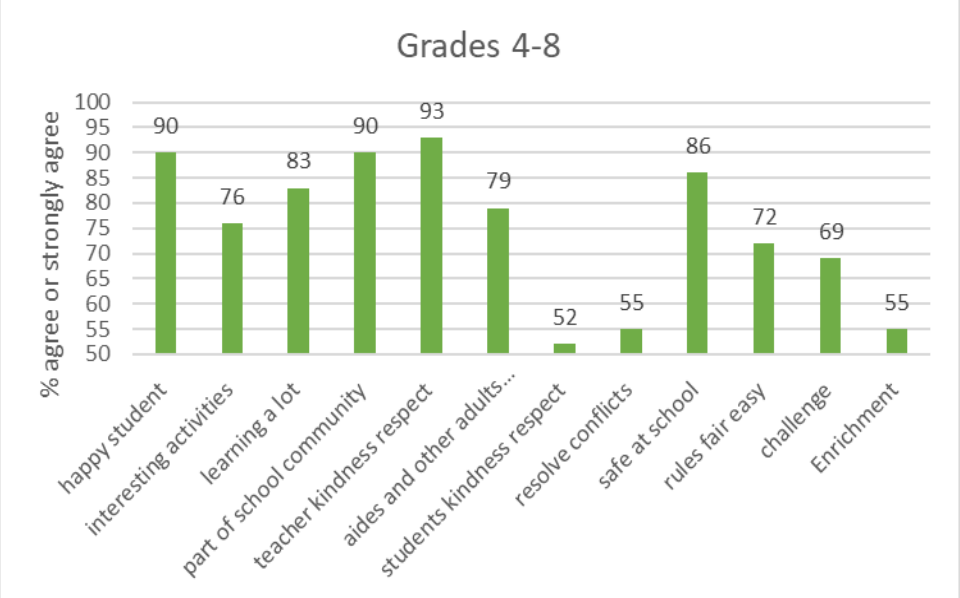
10. The school rules are fair and easy to understand.

11. My work has the right amount of challenge.

12. I have enjoyed having Enrichment classes (when I go to another teacher's class on Tuesday and Wednesday afternoons).




Grades 1-3
% "yes" responses
100
95
90
85
80
75
70
65
60
55
50
87
95
88
93
93
90
63
83
100
83
80
78
happy student
interesting activities
learning a lot
part of school community
teacher kindness respect
aides and other adults...
students kindness respect
resolve conflicts
safe at school
rules fair easy
challenge
Enrichment


Grades 4-8
% agree or strongly agree
100
95
90
85
80
75
70
65
60
55
50
90
76
83
90
93
79
52
55
86
72
69
55
happy student
interesting activities
learning a lot
part of school community
teacher kindness respect
aides and other adults...
students kindness respect
resolve conflicts
safe at school
rules fair easy
challenge
Enrichment

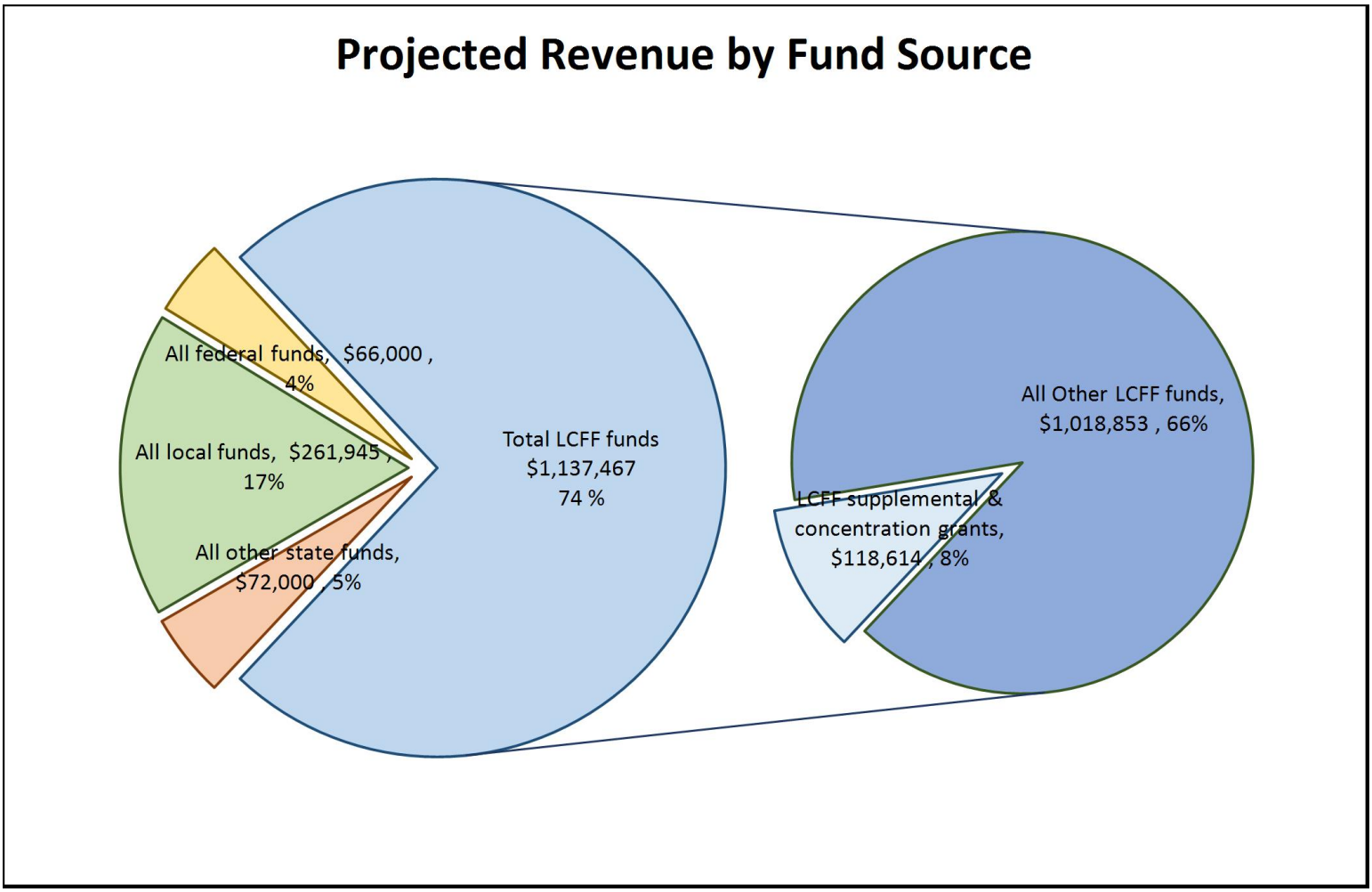
# LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sherwood Montessori
CDS Code: 04614240121475
School Year: 2022-23
LEA contact information:
Michelle Yezbick, Director

(530) 345-6600

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

# Budget Overview for the 2022-23 School Year

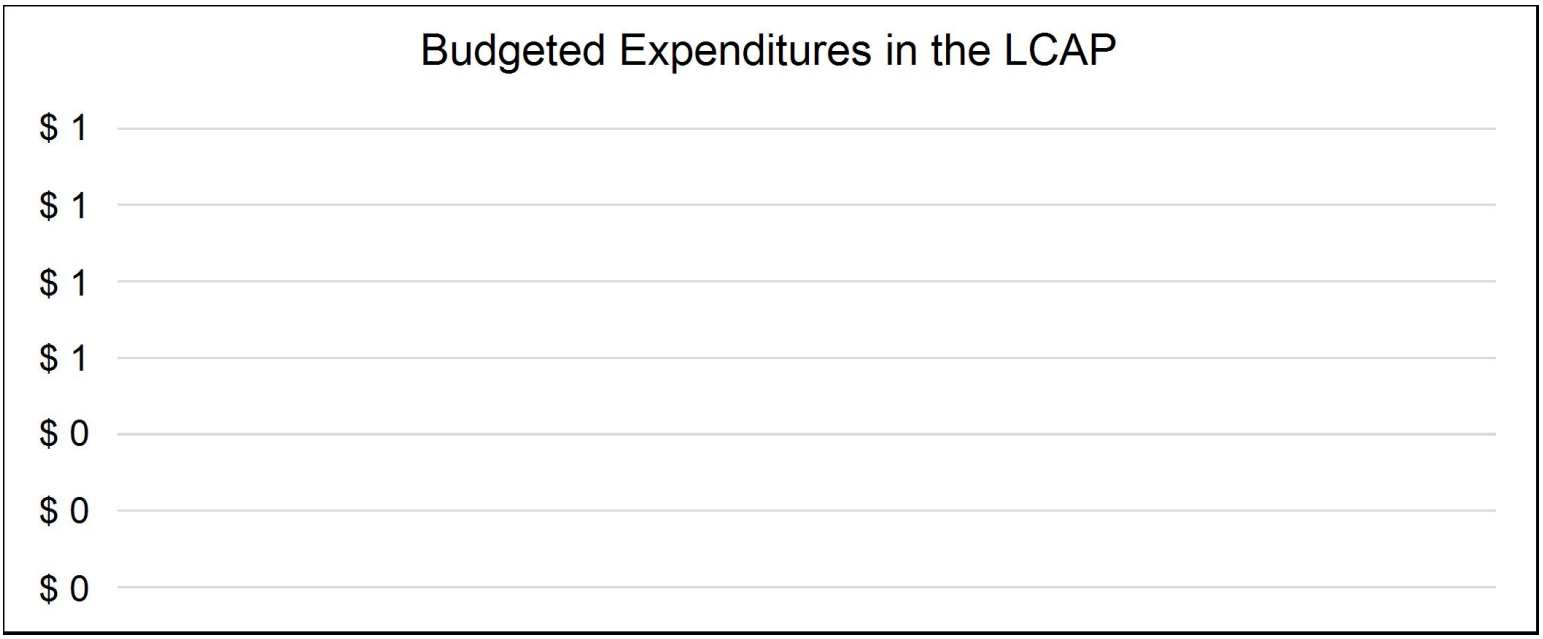



This chart shows the total general purpose revenue Sherwood Montessori expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sherwood Montessori is $1,275,467, of which $1,137,467 is Local Control Funding Formula (LCFF), $72,000 is other state funds, $261,945 is local funds, and $66,000 is federal funds. Of the $1,137,467 in LCFF Funds, $118,614 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

# LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.




This chart provides a quick summary of how much Sherwood Montessori plans to spend for 2022-23. It shows how much of the total is tied to planned actions and services in the LCAP.

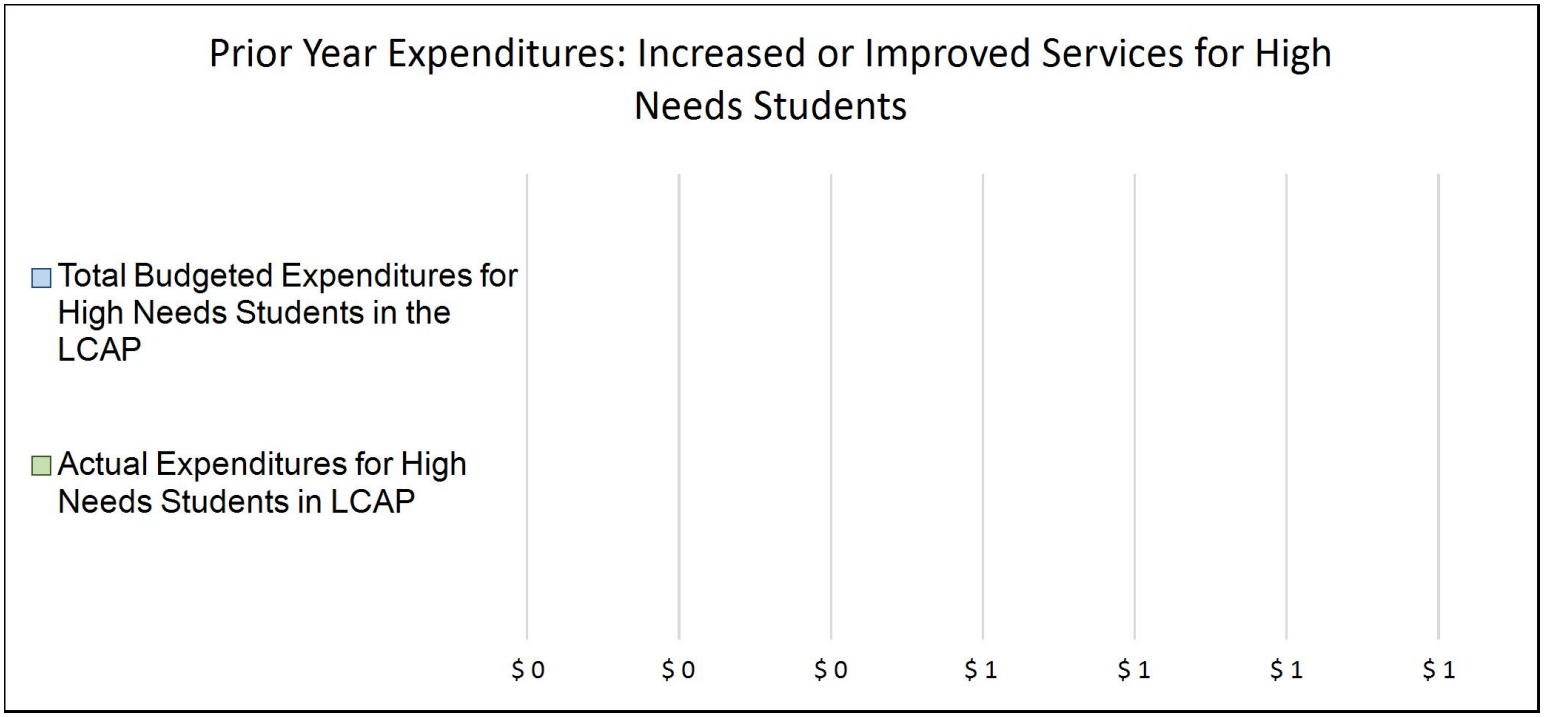
The text description of the above chart is as follows: Sherwood Montessori plans to spend $ for the 2022-23 school year. Of that amount, $ is tied to actions/services in the LCAP and $ is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

# Increased or Improved Services for High Needs Students in the LCAP for the 2022-23 School Year

In 2022-23, Sherwood Montessori is projecting it will receive $118,614 based on the enrollment of foster youth, English learner, and low-income students. Sherwood Montessori must describe how it intends to increase or improve services for high needs students in the LCAP.  Sherwood Montessori plans to spend $ towards meeting this requirement, as described in the LCAP.

# LCFF Budget Overview for Parents

# Update on Increased or Improved Services for High Needs Students in 2021-22




This chart compares what Sherwood Montessori budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sherwood Montessori estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2021-22, Sherwood Montessori's LCAP budgeted $ for planned actions to increase or improve services for high needs students. Sherwood Montessori actually spent $ for actions to increase or improve services for high needs students in 2021-22.

# Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

| Local Educational Agency (LEA) Name | Contact Name and Title | Email and Phone |
|---|---|---|
| Sherwood Montessori | Michelle Yezbick<br>Director | michelle@sherwoodmontessori.org<br>530-345-6600 |

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2020–21 Local Control and Accountability Plan (LCAP).

Sherwood Montessori has an established foundational principle of meaningful educational partner engagement. These efforts were refined and improved through the Local Control and Accountability Plan (LCAP) development process. Sherwood will continue to engage community partners regarding the additional Cost-Of-Living-Adjustment (COLA) and 15% increase to concentration funds during the LCAP community partners engagement opportunities in the first half of 2022.

Previous engagement opportunities include:
Town Hall meetings, there have been two conducted this year. Community members, mostly parents and teachers, ask questions and give input about current topics and initiatives during these meetings.
Data is collected from Exit Surveys when families leave the school either for a move out of the area, to go to a non classroom-based program during the pandemic, or to seek a different educational model. These data give school leaders input regarding what was most appreciated and improvement suggestions.

Community Surveys, LCAP Focus Group work, and discussion at open public meetings were used to create the Local Control and Accountability Plan 2021-2022.

Upcoming engagement opportunities for these funds include:

Two more Town Hall meetings will be held.
Exit Surveys will continue to be offered when families leave the school.
The established procedures with Community Surveys, LCAP Focus Group work, and discussion at open public meetings will be used to create the Local Control and Accountability Plan for 2022-2023.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Sherwood will use concentration grant addon funding to provide staff to offer free tutoring and care after school for students.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

Sherwood used a community survey to develop its LCAP and in 2020-2021 use of one-time federal funds for COVID-19 recovery and response. The survey polled all parents, family member, teachers, staff and community members who were asked to evaluate their experiences and give input regarding what they would like to see in terms of school improvement. Student surveys are also given with questions tailored for their experiences.

During the 2020-2021 school year, input was sought for revised questions to capture the experiences of the students and families during distance learning. Focus group members analyzed the data and prepared a presentation for public meetings of the board of directors. A draft of the plan was vetted at the public meetings and the final plan is posted on the school's website.

Recruitment for the LCAP Focus Group was published in the school announcements dated March 4, March 11, March 25, April 1, and April 8, 2021. Announcements are received by all parents, staff, and teachers as well as interested community members, in email or text or both according to subscriber’s choice.

The teachers' meetings on March 9th, April 8th, and May 13th had items relating to the LCAP, including invitation to join the LCAP Focus Group, presentation of Student Surveys, and evaluation of implementation of State Standards. Teachers also had weekly or biweekly meetings with the School Director throughout the school year in which input could be given on a 1:1 basis. The Sherwood Community Survey was sent out on March 29, 2021 and was available through April 25, 2021. Invitations and reminders to complete the survey were included in the school announcements on March 29, April 1, April 8, April 15 and April 22. Paper flyers were handed out to parents by the school's administrative assistant to parents at pick up time on last day of school before the survey would close on April 25. 62 Sherwood community members (parents, teachers, staff, family members, community members) responded to the survey, the largest number of responses the school has received on such a survey. Student surveys were also filled by Sherwood's students.

The LCAP Focus Group met on April 29, 2021 and on May 10, 2021 and looked at progress made on LCAP goals as measured by the data collected. Actions and goals were examined in light of the data and decisions regarding changes to present in the draft of the LCAP at the May meeting of the Board of Directors in 2021. At the May meeting, the draft was presented and feedback was considered for the final draft which was adopted at the Regular June meeting on June 17, 2021.

This Expenditure Plan for the ESSER III funds was also presented at an open, public meeting of the board of directors with an invitation for attendees to give input on August 19, 2021 and September 16, 2021.

The current year school calendar includes four Town Hall meetings that will be held via Zoom to give stakeholders more opportunities to share their experiences and hopes for the school's programs to address safe in-person instruction and mitigation of learning loss that occurred during school closure.

Sherwood's first Town Hall was held on May 13, 2021 via Zoom to share plans for the 2021-2022 school year and solicit feedback from stakeholders. The meeting was recorded to send to all families as well as corresponding information slide presentations. The Zoom recording and slide presentations were posted on the school's homepage for potential future families to access, as well as any interested community member. This same process was followed during the current school year on September 14, 2021 and November 30, 2021. Next  Town Halls will be February 8, 2022 and April 5, 2022.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

The influx of COVID recovery money has resulted in successes in programming and student and family support. These programs include:

Sherwood's Extended Day program, counseling services and mental wellness supports, in-person learning safety procedures, and providing nutritious meals and snacks for students.

Extended Day Program
Successes: Families have access to free before school and after school care with free breakfast, snacks, enrichment activities, and tutoring. Parents and students report high levels of satisfaction with the program and it has grown since it began.
Challenges: Onerous amount of regulation and reporting required to access and track the restrictive funds. There have been fewer than 80 days since the Plan was adopted and the increased amount of time spent in meetings with compliance experts and the school's business manager take away from time that school leadership could be spending more directly impacting teaching and learning.
Lack of a guarantee of long-term support for the programs being implemented. It is difficult to hire and retain staff for programming that may not be feasible with rising costs of pension benefits and revenues tied to average daily attendance in a state with declining enrollment, to name the most concerning.
Absences of teachers, staff, and student due to COVID illness and exposures. Each time a school employee needs to isolate or quarantine, other school employees who are not out need to take time away from their regular duties to cover the duties of the absent staff. The school has continued to recruit and hire substitute employees and we've not had to close any classrooms or the grade levels due to absences, but the disruption has been significant. Student absences disrupt the effectiveness of the learning accelerations strategies as well as the strategies intended to support mental wellness.

Counseling Services and Mental Wellness Supports
Successes: Students who have accessed services have less frequent behaviors that detract from learning.
Challenges: Onerous compliance work, lack of guaranteed long-term support, and absences (described more fully above).

In-Person Learning Safety Procedures
Successes: Rapid antigen testing has been used to find positive cases to prevent outbreaks at school. School has provided masks and UV air purifiers to all classrooms and costs have been completely covered by emergency relief funds.
Challenges: Time spent to learn how to set up a testing clinic, time spent testing and reporting

Providing Nutritious Meals and Snacks for Students
Successes: Students are fed snacks daily that are provided by the school when hungry and can then focus more on learning.
Challenges: Lack of guarantee of long-term financial support for the program. Currently, the school is spending a great deal of money on snacks, but it has been covered by emergency relief funds.

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

Sherwood Montessori used its fiscal resources to implement the requirements of the Safe Return to In-Person Instruction and Continuity Plan by providing technology, increased cleaning services, masks, and air filtration devices.
The implementation of these additional funds received in the 2021-2022 school year are specifically aligned to the LCAP by providing child care with tutoring, counseling, SEL curriculum, ABAR and trauma informed education training for teachers and staff, and cooking, gardening, dance and drumming instruction for students.
Sherwood Montessori used its fiscal resources to implement the requirements of the ESSER III Expenditure Plan by hiring substitutes to cover staff who were ill, purchasing air purifiers and PPE, providing programs and materials to address mental wellness and responding to behavior in supportive ways, and providing materials training for staff to address learning loss.
The implementation of the additional funds received in the 2021-2022 school year are specifically aligned to the LCAP by addressing basic conditions for learning by maintaining the facility, promoting pupil achievement with programming to address learning loss and promoting positive school climate, parental involvement and pupil engagement by supporting field trips, jchild care, meals and snacks, parent volunteerism, and PBIS.

# Instructions for the Supplement to the Annual Update for the 2021–22 Local Control and Accountability Plan Year

*For additional questions or technical assistance related to the completion of the Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan (LCAP), please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.*

## Introduction

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

When reporting available mid-year outcome, expenditure, and implementation data, LEAs have flexibility to provide this information as best suits the local context, provided that it is succinct and contains a level of detail that is meaningful and accessible for the LEA's educational partners.
The 2021–22 Supplement is considered part of the 2022–23 LCAP for the purposes of adoption, review, and approval, and must be included with the LCAP as follows:

- The 2022–23 Budget Overview for Parents
- The 2021–22 Supplement
- The 2022–23 LCAP
- The Action Tables for the 2022–23 LCAP
- The Instructions for the LCAP Template

As such, the 2021–22 Supplement will be submitted for review and approval as part of the LEA's 2022–23 LCAP.

# Instructions

Respond to the following prompts, as required. In responding to these prompts, LEAs must, to the greatest extent practicable, provide succinct responses that contain a level of detail that will be meaningful and accessible for the LEA's educational partners and the broader public and must, to the greatest extent practicable, use language that is understandable and accessible to parents.

In responding to these prompts, the LEA has flexibility to reference information provided in other planning documents. An LEA that chooses to reference information provided in other planning documents must identify the plan(s) being referenced, where the plan(s) are located (such as a link to a web page), and where in the plan the information being referenced may be found.

**Prompt 1:** "*A description of how and when the LEA engaged, or plans to engage, its* educational partners *on the use of funds provided through the Budget Act of 2021 that were not included in the 2020–21 Local Control and Accountability Plan (LCAP).*"

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

**Prompt 2:** "*A description of how LEA used, or plans to use, the concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.*"

If LEA does not receive a concentration grant or the concentration grant add-on, provide this explanation.

Describe how the LEA is using, or plans to use, the concentration grant add-on funds received consistent with California *Education Code*

Section 42238.02, as amended, to increase the number of certificated staff, classified staff, or both, including custodial staff, who provide direct services to students on school campuses with greater than 55 percent unduplicated pupil enrollment, as compared to schools with an enrollment of unduplicated students that is equal to or less than 55 percent.

In the event that the additional concentration grant add-on is not sufficient to increase the number of staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, describe how the LEA is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

**Prompt 3:** "*A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.*"

If the LEA did not receive one-time federal funding to support recovery from the COVID-19 pandemic and the impacts of distance learning on students, provide this explanation.

Describe how and when the LEA engaged its educational partners on the use of one-time federal funds it received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on students. See the COVID-19 Relief Funding Summary Sheet web page (https://www.cde.ca.gov/fg/cr/relieffunds.asp) for a listing of COVID-19 relief funding and the Federal Stimulus Funding web page (https://www.cde.ca.gov/fg/cr/) for additional information on these funds. The LEA is not required to describe engagement that has taken place related to state funds.

**Prompt 4:** "A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation."

If an LEA does not receive ESSER III funding, provide this explanation.

Describe the LEA's implementation of its efforts to maintain the health and safety of students, educators, and other staff and ensure the continuity of services, as required by the federal American Rescue Plan Act of 2021, and its implementation of the federal Elementary and Secondary School Emergency Relief (ESSER) expenditure plan to date, including successes and challenges.

**Prompt 5:** "A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA's 2021–22 LCAP and Annual Update."

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans in a manner that is aligned with the LEA's 2021–22 LCAP. For purposes of responding to this prompt, "applicable plans" include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education
November 2021

# Local Control Accountability Plan

**The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.**

| Local Educational Agency (LEA) Name | Contact Name and Title | Email and Phone |
|---|---|---|
| Sherwood Montessori | Michelle Yezbick, Director | michelle@sherwoodmontessori.org<br>(530) 345-6600 |

# Plan Summary [2022-23]

## General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

The mission of Sherwood Montessori is to educate TK-8 students of the greater Chico area by providing Montessori education within the context of mutual respect and joy. The focus of the education is on engaging critical thinking and fostering empathy, and developing the skills needed to become competent, responsible citizens who are life-long learners and skillful problem solvers.
The school serves our community by providing a rich and supportive educational environment for children based upon the philosophy of Maria Montessori which allows each child to reach his or her own potential academically, personally, and socially and focuses on educating the whole child intellectually, physically, and psychologically. The methodology used develops a firm foundation for the students, and emphasizes ethics, initiative, persistence, and self-confidence.
Our mission is accomplished by a concerted community-based effort between the school, the parents, and the individual child.

Sherwood currently serves 115 students with multi-age groups. We have one classrooms with learners ages 4-6 (one TK/K class), three classrooms with learners 6-9 years old (1st/2nd/3rd), two classrooms with learners 9-12 years old (4th/5th/6th), and one classroom with 12-14 year old learners (7th/8th). A Learning Center classroom serves students from all grades with specialized academic needs.

The main campus of Sherwood Montessori is located on the north side of Chapman Elementary campus, with an auxiliary campus located at 1010 Cleveland Ave. The main campus currently includes seven classrooms and an office; 20th Street Park connects the two campuses. Through funds available from the Measure K bond, Sherwood has been able to complete a construction project to install three classrooms at the 1010 site. In the 2022-2023 school year, two TK/K classrooms will move to classrooms located at 1010 with the third classroom housing the school's library and before and after school child care with tutoring after school.

This LCAP also serves as the school's Single Plan for Student Achievement (SPSA) with Title 1 funds herein accounted for. The process used to create this plan satisfies all requirements for creating a SPSA under Title 1.

# Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

Community survey results indicate that a high number of parents felt satisfied or very satisfied with the opportunity the school provided to make an impact in academic outcomes for students, a new question this year satisfying the California Department of Education's requirements for LEAs to use data and self-reflection to analyze efforts to implement Priority 3: Parental Involvement and Family Engagement. Other gains were seen in satisfaction for the curriculum in terms of Montessori authenticity and the support given to struggling learners. The free Extended Day (child care) with tutoring program also had positive responses.
From the students, the highest rated areas overall were feeling safe at school, the respect and kindness they received from their teachers, and feeling a part of the community.

# Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

Satisfaction fell the most in three areas: satisfaction in terms of respectfulness and inclusivity, the school's approach to discipline and conflict resolution using PBIS, and teachers. Qualitative input gleaned from narrative survey responses and input given in meetings indicated that the PBIS program and the decline in satisfaction in terms of respectfulness and inclusivity were related in that PBIS celebrations for students with positive behavior were not accessible for students who struggled with regulating their behavior because of disabilities or trauma. The decline in satisfaction with teachers had largely to do with the loss of two beloved teachers who had been with the school for many years. In a small school, with seven classroom teachers, a change of two teachers is impactful. It was also noted in feedback that both teachers that were lost were People of Color. With a diverse community of students and families, the loss of faculty who were from diverse backgrounds was disappointing.

From the students, the lowest rated areas overall were respect and kindness shown by other students, the enrichment classes (art, music, gardening, Spanish), and the help received to resolve conflicts with other students.

# LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

An analysis of the educational partners' feedback indicates that our efforts to provide free childcare with tutoring is appreciated and these programs should continue. Our community would value continued refinement of the way that the school supports students with challenges to emotional regulation. Improvements in the responses to behavior in our discipline program would increase the perception of inclusivity and improve relationships between the students. Providing counseling this year was a step in the right direction. Actions in the LCAP would increase the capacity of existing staff to respond in helpful ways to children who are dysregulated emotionally, which in turn will allow more time for teaching and learning.

# Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

## *Schools Identified*

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Sherwood is not eligible for CSI.

## *Support for Identified Schools*

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

N/A

## *Monitoring and Evaluating Effectiveness*

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

N/A

# Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Recruitment for the LCAP Focus Group was published in the school announcements dated February 10, February 17, February 24, March 3, March 10 and March 24. Announcements are received by all parents, staff, and teachers as well as interested community members, in email or text or both according to subscriber's choice.

The teachers' meeting on March 8th and April 7th had items relating to the LCAP, including invitation to join the LCAP Focus Group, planning for Student Surveys, and evaluation of implementation of State Standards. Teachers also had biweekly meetings with the School Director throughout the school year in which input could be given on a 1:1 basis.

The Sherwood Community Survey was sent out on April 7, 2022 and was available through May 6, 2022. Invitations and reminders to complete the survey were included in the school announcements on April 7, April 14, April 21, and April 28. Devices with the survey pulled up were available during a well-attended community event.

On September 14, November 30, February 8, and April 5 Town Hall Meetings were held via Zoom to share information and solicit feedback from educational partners. Reminders went out in weekly school announcements in the weeks ahead of the meetings and the meetings were shown on the school's Google calendar on the homepage of the school's website. The meetings were recorded to send to all families as well as corresponding information slide presentations. Finally, the Zoom recording and slide presentations were posted on the school's homepage for potential future families to access, as well as any interested community member.

The LCAP Focus Group met on March 30, 2022 and on May 11, 2022 and looked at progress made on LCAP goals as measured by the data collected. Actions and goals were examined in light of the data and decisions regarding changes to present in the draft of the LCAP at the May meeting of the Board of Directors. At the May meeting, the draft was presented and feedback was considered for the final draft which was adopted at the Regular June meeting on June 16, 2022.

A summary of the feedback provided by specific educational partners.

Feedback from students-Students reported most satisfaction with feeling safe at school and that their teacher treated them with kindness and respect. They were most dissatisfied with the way they were treated by other students.
Feedback from parents-Parents were happy with the way the school offered opportunity to impact student outcomes and named the after school program as a program they appreciated. They were unhappy with the school's approach to discipline with PBIS, which in turn effected the perspective of respectful inclusivity as students with behavior problems were left out of celebrations for positive behavior.
Feedback from teachers and staff-Teachers and staff reported satisfaction in seeing growth students made being back in person for full days of school, but that emotional dysregulation and behavior issues kept them from maximizing teaching and learning.

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

# Goals and Actions

## Goal

| Goal # | Description |
|---|---|
| 1 | Broad Goal: Provide an equitable learning environment with high quality, authentic Montessori instruction, curriculum aligned to Common Core State Standards, a broad range of traditional Montessori materials, highly-qualified teachers, and a facility in good repair.<br>Focus Goals:<br>1.1: Provide highly qualified teachers for all students.<br>1.2: Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS).<br>1.3: Provide a broad range of Montessori materials.<br>1.4: Provide a facility in good repair and maintain recess equipment.<br>1.5: Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. |

An explanation of why the LEA has developed this goal.

The Broad Goal here covers the State Priority 1: Basic Conditions for Learning.
A rationale for each Focus Goal is provided below:
1.1 The quality of the instruction students receive directly impacts their learning experiences and academic outcomes.
1.2 An effective curriculum increases students' understanding about the world around them and provides them with knowledge and skills necessary for success in the 21st century.
1.3 All public school students must be provided with equal access to instructional materials.
1.4 All public school students must be provided with safe and decent school facilities. Recess equipment is an important part of the school environment, as expressed by Sherwood students in the Student Survey.
1.5 Instructional strategies such as effective use of targeted direct instruction, scaffolding and modeling, monitoring student learning, and two-way feedback among students and teachers are associated with improved student achievement. The SST process addresses these and results in a plan formed with communication and analysis of data.

# Measuring and Reporting Results

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| Personnel files/teachers' credentials | 100% highly qualified credentialed teachers | 100% highly qualified credentialed teachers | | | 100% highly qualified credentialed teachers |
| CAASPP Scores | 33.4 Points Below Standard for ELA<br>90 Points Below Standard for math | TBD | | | 20 Points Below Standard for ELA<br>60 Points Below Standard for math |
| Montessori Materials Inventories | Materials are in good repair, some classrooms need replacement materials | Materials are in good repair and teachers have ordered replacement materials for those showing wear. | | | All classrooms have a broad range of materials for the grade levels served. |
| Facilities Inspection Tool | Roof leaks in restroom and 1010 Cleveland classrooms; recess & PE equipment recently replenished | Roof leaks at 1010 were addressed. Restroom leaks will be addressed over the summer of 2022. Recess and PE equipment replenished. New check-out system for recess assures all students have access to quality equipment. | | | Facility in good repair; PE and recess equipment maintained |
| Local indicator/School Community Survey | 77% of results Satisfied or Very Satisfied with Support Given to Struggling Learners | 79% of respondents indicated that they were satisfied or very satisfied with the support given to struggling learners. | | | 80% Satisfied or Very Satisfied with Support Given to Struggling Learners |

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **1.1** | Provide highly qualified teachers for all students. | Highly qualified teachers will hold the appropriate credentials for their assignments. | $1,500.00 | No |
| **1.2** | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | Sherwood will implement Montessori instruction aligned with state board adopted academic content and performance standards for all students. | $16,680.00 | No |
| **1.3** | Provide a broad range of Montessori materials. | All students in the school will have sufficient access to the standards-aligned instructional materials that are congruent with Sherwood's Montessori mission. | $8,000.00 | No |
| **1.4** | Provide a facility in good repair and maintain recess equipment. | It is a basic service for a school to provide a facility in good repair. Input from students indicate that they value playground equipment. | $7,700.00 | No |
| **1.5** | Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. | | $48,200.00 | No |

# Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

An explanation of how effective the specific actions were in making progress toward the goal.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

| Goal # | Description |
|---|---|
| **2** | Provide a positive school climate with authentic opportunities for parent involvement.<br>2.1 Ensure that parents understand the ways the school communicates with students' families.<br>2.2 Ensure that parents understand the nature of the Montessori method of education.<br>2.3 Improve parent involvement and volunteerism.<br>2.4 Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. |

An explanation of why the LEA has developed this goal.

## Measuring and Reporting Results

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| Local metric/Parent Square | 100% parents contactable | 100% parents contactable | | | 100% parents contactable |
| Local metric/Community Survey Results | 78% Satisfied or Very Satisfied with Opportunities the School has Extended to Learn about the Montessori Approach to Education | 91% of respondents satisfied or very satisfied with satisfaction in terms of: curriculum, in terms of Montessori authenticity.<br>of respondents satisfied or very satisfied with satisfaction in terms of: opportunity by the school to make an impact in academic | | | 80% Satisfied or Very Satisfied with Opportunities the School has Extended to Learn about the Montessori Approach to Education and/or satisfaction in terms of: opportunity by the school to make an impact in academic outcomes for my student/s. |

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| | | outcomes for my student/s. | | | |
| Local metric/Parent Volunteer Tracking System | 20% of parents met or exceeded 50 volunteer hours per year | 23% of families reported volunteer hours; 3% of families met or exceeded 50 volunteer hours per year | | | 30% of families report volunteer hours. 10% of families meet or exceed 30 volunteer hours per year. |
| Chronic absenteeism rate | 14.44% Chronic Absenteeism Rate | Chronic Absenteeism Rate during a pandemic is not good data. | | | 10% Chronic Absenteeism Rate |
| Chronic absenteeism rate: Subgroup Hispanic | 25% Hispanic Chronically Absent | Chronic Absenteeism Rate during a pandemic is not good data. | | | 10% Hispanic Chronically Absent |
| Decreased or maintained suspension rate | 2.8% suspension rate | 2.797% suspension rate | | | 2.8% suspension rate or lower |

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **2.1** | Ensure that parents understand the ways the school communicates with students' families. | All parents will be enrolled in Parent Square with current contact information and preferences indicated for email, text or both as well as a current phone number with which to receive robocalls from the school. | $4,600.00 | No |
| **2.2** | Ensure that parents understand the nature of the | Parents will have opportunities to learn about Montessori education. | $4,650.00 | No |

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| | Montessori method of education. | | | |
| **2.3** | Improve parent involvement and volunteerism. | The school will provide opportunities for parents to become involved in their children's education and volunteer for the school. | $2,800.00 | No |
| **2.4** | Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | The school will promote regular attendance through the PBIS program and through outreach efforts to educate families on the importance of regular attendance. | $15,600.00 | No |
| **2.5** | | | | |

# Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

An explanation of how effective the specific actions were in making progress toward the goal.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

| Goal # | Description |
|---|---|
| **3** | Socioeconomically disadvantaged students will have access to free or reduced lunch, free after school tutoring, and free child care before and after school. |

An explanation of why the LEA has developed this goal.

Actions associated with this goal are in response to metrics from the state Dashboard showing lower scores for students from lower income backgrounds in CAASPP testing.

## Measuring and Reporting Results

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| CAASPP scores | ELA 63 points below standard<br>Math 124.3 points below standard | TBD | | | ELA 40 points below standard<br>Math 90 points below standard |

## Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch. | Students will have access to free breakfast and lunch through Chico Unified Nutrition Services. | $1,100.00 | Yes |
| **3.2** | Socioeconomically disadvantaged students will have | Students will have access to free tutoring after school as described in our Extended Learning Plan. | $12,240.00 | Yes |

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| | access to free after school tutoring. | | | |
| **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Students from lower income backgrounds will have access to free child care. | $12,240.00 | Yes |

# Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

An explanation of how effective the specific actions were in making progress toward the goal.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

| Goal # | Description |
|---|---|
| **4** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. |

An explanation of why the LEA has developed this goal.

This goal is ongoing/a maintenance goal based on feedback from the community indicating appreciation for financial support for all students to attend all field trips.

## Measuring and Reporting Results

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| Local measures/Community Survey Results & Student Surveys | The majority of students agree or strongly agree that they are happy to be students at the school. Teachers give feedback about the importance of field trips and inclusion of all students. | 89% of students agree or strongly agree that they are happy to be students at the school. Teachers report that including all students in filed trips is essential. | | | The majority of students will agree or strongly agree that they are happy to be students at the school. Teachers will give feedback about the importance of field trips and inclusion of all students. |

## Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **4.1** | Socioeconomically disadvantaged students will have access to | All student fees will be covered by the school for families that can't afford to contribute, including end of year middle school overnight trips to Ashland/Shakespeare Festival or Environmental Camp. | $4,000.00 | Yes |

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| | scholarships to attend field trips. | | | |

# Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

An explanation of how effective the specific actions were in making progress toward the goal.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

| Goal # | Description |
|---|---|
| 5 | |

An explanation of why the LEA has developed this goal.

## Measuring and Reporting Results

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| | | | | | |

## Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| | | | | |

## Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

An explanation of how effective the specific actions were in making progress toward the goal.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2022-23]

| Projected LCFF Supplemental and/or Concentration Grants | Projected Additional LCFF Concentration Grant (15 percent) |
|---|---|
| 118,614 | |

**Required Percentage to Increase or Improve Services for the LCAP Year**

| Projected Percentage to Increase or Improve Services for the Coming School Year | LCFF Carryover — Percentage | LCFF Carryover — Dollar | Total Percentage to Increase or Improve Services for the Coming School Year |
|---|---|---|---|
| | | $0.00 | |

**The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.**

## Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

| **Staff-to-student ratios by type of school and concentration of unduplicated students** | Schools with a student concentration of 55 percent or less | Schools with a student concentration of greater than 55 percent |
|---|---|---|
| Staff-to-student ratio of classified staff providing direct services to students | N/A | |
| Staff-to-student ratio of certificated staff providing direct services to students | N/A | |

## 2022-23 Total Expenditures Table

| Totals | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds | Total Personnel | Total Non-personnel |
|---|---|---|---|---|---|---|---|
| Totals | $62,585.00 | $24,480.00 | | $52,245.00 | $139,310.00 | $117,610.00 | $21,700.00 |

| Goal | Action # | Action Title | Student Group(s) | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds |
|---|---|---|---|---|---|---|---|---|
| 1 | 1.1 | Provide highly qualified teachers for all students. | All<br>Students with Disabilities | $1,500.00 | | | | $1,500.00 |
| 1 | 1.2 | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | All | $12,635.00 | | | $4,045.00 | $16,680.00 |
| 1 | 1.3 | Provide a broad range of Montessori materials. | All | $8,000.00 | | | | $8,000.00 |
| 1 | 1.4 | Provide a facility in good repair and maintain recess equipment. | All | $7,700.00 | | | | $7,700.00 |
| 1 | 1.5 | Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. | All<br>Students with Disabilities | | | | $48,200.00 | $48,200.00 |
| 2 | 2.1 | Ensure that parents understand the ways the school communicates with students' families. | All | $4,600.00 | | | | $4,600.00 |

| Goal | Action # | Action Title | Student Group(s) | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds |
|---|---|---|---|---|---|---|---|---|
| 2 | 2.2 | Ensure that parents understand the nature of the Montessori method of education. | All | $4,650.00 | | | | $4,650.00 |
| 2 | 2.3 | Improve parent involvement and volunteerism. | All | $2,800.00 | | | | $2,800.00 |
| 2 | 2.4 | Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | All | $15,600.00 | | | | $15,600.00 |
| 2 | 2.5 | | | | | | | |
| 3 | 3.1 | Socioeconomically disadvantaged students will have access to free or reduced lunch. | Low Income | $1,100.00 | | | | $1,100.00 |
| 3 | 3.2 | Socioeconomically disadvantaged students will have access to free after school tutoring. | Low Income | | $12,240.00 | | | $12,240.00 |
| 3 | 3.3 | Socioeconomically disadvantaged students will have access to free child care before and after school. | Low Income | | $12,240.00 | | | $12,240.00 |
| 4 | 4.1 | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Low Income | $4,000.00 | | | | $4,000.00 |

## 2022-23 Contributing Actions Table

| 1. Projected LCFF Base Grant | 2. Projected LCFF Supplemental and/or Concentration Grants | 3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1) | LCFF Carryover — Percentage (Percentage from Prior Year) | Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %) | 4. Total Planned Contributing Expenditures (LCFF Funds) | 5. Total Planned Percentage of Improved Services (%) | Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5) | Totals by Type | Total LCFF Funds |
|---|---|---|---|---|---|---|---|---|---|
| | 118,614 | | | | $5,100.00 | 0.00% | | **Total:** | $5,100.00 |
| | | | | | | | | **LEA-wide Total:** | $5,100.00 |
| | | | | | | | | **Limited Total:** | $0.00 |
| | | | | | | | | **Schoolwide Total:** | $0.00 |

| Goal | Action # | Action Title | Contributing to Increased or Improved Services? | Scope | Unduplicated Student Group(s) | Location | Planned Expenditures for Contributing Actions (LCFF Funds) | Planned Percentage of Improved Services (%) |
|---|---|---|---|---|---|---|---|---|
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch. | Yes | LEA-wide | Low Income | | $1,100.00 | |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | LEA-wide | Low Income | | | |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | LEA-wide | Low Income | | | |
| **4** | **4.1** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | LEA-wide | Low Income | | $4,000.00 | |

## 2021-22 Annual Update Table

| Totals | Last Year's Total Planned Expenditures (Total Funds) | Total Estimated Expenditures (Total Funds) |
|---|---|---|
| **Totals** | $145,310.00 | $0.00 |

| Last Year's Goal # | Last Year's Action # | Prior Action/Service Title | Contributed to Increased or Improved Services? | Last Year's Planned Expenditures (Total Funds) | Estimated Actual Expenditures (Input Total Funds) |
|---|---|---|---|---|---|
| **1** | **1.1** | Provide highly qualified teachers for all students. | No | $1,500.00 | |
| **1** | **1.2** | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | No | $16,680.00 | |
| **1** | **1.3** | Provide a broad range of Montessori materials. | No | $8,000.00 | |
| **1** | **1.4** | Provide a facility in good repair and maintain recess equipment. | No | $7,700.00 | |
| **1** | **1.5** | Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. | No | $48,200.00 | |
| **2** | **2.1** | Ensure that parents understand the ways the school communicates with students' families. | No | $4,600.00 | |
| **2** | **2.2** | Ensure that parents understand the nature of the Montessori method of education. | No | $4,650.00 | |
| **2** | **2.3** | Improve parent involvement and volunteerism. | No | $2,800.00 | |

| Last Year's Goal # | Last Year's Action # | Prior Action/Service Title | Contributed to Increased or Improved Services? | Last Year's Planned Expenditures (Total Funds) | Estimated Actual Expenditures (Input Total Funds) |
|---|---|---|---|---|---|
| **2** | **2.4** | Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | No | $15,600.00 | |
| **2** | **2.5** | Launch Sherwood Montessori Bilingual Scholars program. | Yes | $6,000.00 | |
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch. | Yes | $1,100.00 | |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | $12,240.00 | |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | $12,240.00 | |
| **4** | **4.1** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | $4,000.00 | |

## 2021-22 Contributing Actions Annual Update Table

| 6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount) | 4. Total Planned Contributing Expenditures (LCFF Funds) | 7. Total Estimated Expenditures for Contributing Actions (LCFF Funds) | Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4) | 5. Total Planned Percentage of Improved Services (%) | 8. Total Estimated Percentage of Improved Services (%) | Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8) |
|---|---|---|---|---|---|---|
| | $11,100.00 | $0.00 | $0.00 | 0.00% | 0.00% | 0.00% |

| Last Year's Goal # | Last Year's Action # | Prior Action/Service Title | Contributing to Increased or Improved Services? | Last Year's Planned Expenditures for Contributing Actions (LCFF Funds) | Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds) | Planned Percentage of Improved Services | Estimated Actual Percentage of Improved Services (Input Percentage) |
|---|---|---|---|---|---|---|---|
| **2** | **2.5** | Launch Sherwood Montessori Bilingual Scholars program. | Yes | $6,000.00 | | | |
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch. | Yes | $1,100.00 | | | |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | | | | |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | | | | |
| **4** | **4.1** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | $4,000.00 | | | |

## 2021-22 LCFF Carryover Table

| 9. Estimated Actual LCFF Base Grant (Input Dollar Amount) | 6. Estimated Actual LCFF Supplemental and/or Concentration Grants | LCFF Carryover — Percentage (Percentage from Prior Year) | 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %) | 7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds) | 8. Total Estimated Actual Percentage of Improved Services (%) | 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8) | 12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9) | 13. LCFF Carryover — Percentage (12 divided by 9) |
|---|---|---|---|---|---|---|---|---|
| | | | 0.00% | $0.00 | 0.00% | 0.00% | $0.00 | 0.00% |

# Instructions

Plan Summary

Engaging Educational Partners

Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

*For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.*

# Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [*EC*] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (*EC* Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (*EC* Section 52064[b][4-6]).

    - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).

    - Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

# Plan Summary

## Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

## Requirements and Instructions

***General Information*** – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

***Reflections: Successes*** – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

***Reflections: Identified Need*** – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the "Red" or "Orange" performance category or any local indicator where the LEA received a "Not Met" or "Not Met for Two or More Years" rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the "all student*"* performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

***LCAP Highlights*** – Identify and briefly summarize the key features of this year's LCAP.

***Comprehensive Support and Improvement*** – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified**: Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools**: Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness**: Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

# Engaging Educational Partners

# Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: https://www.cde.ca.gov/re/lc/.

# Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

**Local Control and Accountability Plan:**
For county offices of education and school districts only, verify the LEA:

a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.

b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.

d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.

e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

**Prompt 1**: "A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP."

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

**Prompt 2**: "A summary of the feedback provided by specific educational partners."

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

**Prompt 3**: "A description of the aspects of the LCAP that were influenced by specific input from educational partners."

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, "aspects" of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

# Goals and Actions

## Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

## Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.

- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.

- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

**Focus Goal(s)**
**Goal Description:** The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

**Broad Goal**
**Goal Description:** Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

**Maintenance of Progress Goal**
**Goal Description:** Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

**Explanation of why the LEA has developed this goal**: Explain how the actions will sustain the progress exemplified by the related metrics.

**Required Goals**
In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

**Consistently low-performing student group(s) criteria:** An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA's eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

**Low-performing school(s) criteria:** The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.

- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

**Measuring and Reporting Results:**
For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric**: Indicate how progress is being measured using a metric.
- **Baseline**: Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome**: When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome**: When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome**: When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24**: When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the "**Measuring and Reporting Results**" part of the Goal.

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for Year 3 (2023–24) |
|---|---|---|---|---|---|
| Enter information in this box when completing the LCAP for **2021–22**. | Enter information in this box when completing the LCAP for **2021–22**. | Enter information in this box when completing the LCAP for **2022–23**. Leave blank until then. | Enter information in this box when completing the LCAP for **2023–24**. Leave blank until then. | Enter information in this box when completing the LCAP for **2024–25**. Leave blank until then. | Enter information in this box when completing the LCAP for **2021–22** or when adding a new metric. |

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

***Actions***: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

***Actions for English Learners:*** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

***Actions for Foster Youth***: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

## Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

## Requirements and Instructions

***Projected LCFF Supplemental and/or Concentration Grants***: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

***Projected Additional LCFF Concentration Grant (15 percent):*** Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

***Projected Percentage to Increase or Improve Services for the Coming School Year*:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

***LCFF Carryover — Percentage:*** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

***LCFF Carryover — Dollar:*** Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

***Total Percentage to Increase or Improve Services for the Coming School Year:*** Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

***Required Descriptions:***

**For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.**

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 *CCR* Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

**Principally Directed and Effective:** An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

> After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])
>
> In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])
>
> These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

**COEs and Charter Schools**: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

## For School Districts Only:

### Actions Provided on an LEA-Wide Basis:

***Unduplicated Percentage > 55 percent:*** For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

***Unduplicated Percentage < 55 percent:*** For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

### Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

**For schools with 40 percent or more enrollment of unduplicated pupils:** Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

**For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils:** Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

**A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.**

Consistent with the requirements of 5 *CCR* Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

**A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.**

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

# Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

# Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #**: Enter the LCAP Goal number for the action.
- **Action #**: Enter the action's number as indicated in the LCAP Goal.
- **Action Title**: Provide a title of the action.
- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span**: Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

# Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

# Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

# Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.

- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).

    - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

# LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

# Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

**Contributing Actions Table**

- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
    - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
    - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

**Contributing Actions Annual Update Table**

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
    - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
    - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
    - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
    - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
    - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
    - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

## LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
    - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
    - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
    - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

      The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
    - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
January 2022

# SHERWOOD MONTESSORI

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, June 16, 2022 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00)

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

**A.2 Commendations** Outgoing directors will receive commendations.

**B. CONSENT AGENDA** (6:05)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, May 19, 2022.

**B.2 Approval of Contract with Mandelbaum Consulting** Consider approval of a contract with Mandelbaum Consulting.

**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter

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unless duly agendized for a future meeting.

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS** (6:20)

**E.1 Items Removed from Consent (If any)**

**E.2 Reports and Communications** (6:20)

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 SMPO Report**
**E.2.2 School Director Report**
**E.2.3 Treasurer Report**

**E.3 Action Items** (6:30)

**E.3.1 Original Budget 2022-2023**
The Board will be asked to adopt a budget for the 2022-2023 school year.
**Action Requested:** Adopt budget.

**E.3.2 Local Control Accountability Plan (LCAP)**
A draft of the LCAP will be presented for adoption.
**ACTION REQESTED:** Adopt LCAP.

**E.3.3 Local Indicators Report**
A report of Local Indicators will be presented.
**ACTION REQUESTED:** Receive report.

**E.3.4 Declaration of Need/Statement of Need**
Consider approval of Declaration of Need/Statement of Need
**ACTION REQUESTED:** Approve application documents.

**F. CLOSED SESSION** (6:55)

**F.1 Public Employee Performance Evaluation**
With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director.

**G. FUTURE AGENDA ITEMS** (7:15)
The Board will welcome new members.

**H. ADJOURNMENT** (7:20)

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SHERWOOD MONTESSORI

**RESOLUTION 061622a**
**RESOLUTION OF COMMENDATION**

***WHEREAS, Karey Cooper*** *was first appointed to serve on the Board of Directors of Sherwood Montessori in August, 2021, and continued her service for a period of ten months, during which she rarely missed a meeting; and*

***WHEREAS****, she has consistently brought to the proceedings a sense of responsibility to the Mission of Sherwood Montessori; and*

***WHEREAS,*** *Karey has discharged her Board duties as a Director with a high level of competence, preparedness and objectivity; and*

***WHEREAS****, Karey brought to Sherwood Montessori her perspective as a parent and community leader; and*

***WHEREAS,*** *Karey has exhibited a sound knowledge of Sherwood's functions and concern for the successful future of the school and worked diligently to ensure that the actions taken by the Board were in the best interest of the students and families they serve; and*

***NOW, THEREFORE, BE IT RESOLVED,*** *that the Board of Directors of Sherwood Montessori recognizes and expresses its sincere appreciation for the services Karey Cooper to the community of Sherwood Montessori.*

***FURTHER,*** *that this Resolution be included within the minutes of the Board of Directors of Sherwood Montessori and that a copy of said Resolution be presented to Karey Cooper as a testimonial of the sentiments of the Board of Directors and Community of Sherwood Montessori.*

***PASSED AND ADOPTED*** *by the Board of Directors of Sherwood Montessori on the 16th day of June, 2022.*

Michelle Yezbick, Director
Sherwood Montessori

Russell Shapiro, Chair of the Board
Sherwood Montessori

SHERWOOD MONTESSORI

**RESOLUTION 061622b**
**RESOLUTION OF COMMENDATION**

***WHEREAS, Dan LaBar*** *was first appointed to serve on the Board of Directors of Sherwood Montessori in August, 2021, and continued his service for a period of ten months, during which he rarely missed a meeting; and*

***WHEREAS,*** *he has consistently brought to the proceedings a sense of responsibility to the Mission of Sherwood Montessori; and*

***WHEREAS,*** *Dan has discharged his Board duties as Treasurer with a high level of competence, preparedness and objectivity; and*

***WHEREAS****, Dan brought to Sherwood Montessori an experienced perspective as a Northern California charter leader; and*

***WHEREAS,*** *Dan has exhibited a sound knowledge of Sherwood's functions and concern for the successful future of the school and worked diligently to ensure that the actions taken by the Board were in the best interest of the students and families they serve; and*

***NOW, THEREFORE, BE IT RESOLVED,*** *that the Board of Directors of Sherwood Montessori recognizes and expresses its sincere appreciation for the services Dan LaBar to the community of Sherwood Montessori.*

***FURTHER,*** *that this Resolution be included within the minutes of the Board of Directors of Sherwood Montessori and that a copy of said Resolution be presented to Dan LaBar as a testimonial of the sentiments of the Board of Directors and Community of Sherwood Montessori.*

***PASSED AND ADOPTED*** *by the Board of Directors of Sherwood Montessori on the 16th day of June, 2022.*

Michelle Yezbick, Director
Sherwood Montessori

Russell Shapiro, Chair of the Board
Sherwood Montessori

SHERWOOD MONTESSORI

**REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS**

Join Zoom Meeting
https://us02web.zoom.us/j/5245217471?pwd=b2tSWDhkYURxUUVsTVlPWmZJRDVzZz09

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
+16699006833,,5245217471#,,,,*150836# US (San Jose)
+13462487799,,5245217471#,,,,*150836# US (Houston)

Dial by your location
+1 669 900 6833 US (San Jose)
+1 346 248 7799 US (Houston)
+1 253 215 8782 US (Tacoma)
+1 312 626 6799 US (Chicago)
+1 929 205 6099 US (New York)
+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, May 19, 2022 – 6:00 p.m.**

**MINUTES**

**A. CALL TO ORDER**

**A.1 Roll Call** Russell Shapiro, Beth Hammer, Dan LaBar, Robyn Howley, Karey Cooper

*Meeting was called to order at 6:02 PM by Russell Shapiro. Beth Hammer, Dan LaBar, Robyn Howley and Karey Cooper were in attendance.*

**B. CONSENT AGENDA**

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, April 28, 2022

*Consent agenda was reviewed by Board, Beth Hammer moved to approve and Robyn Howley seconded with unanimous approval by Board members.*

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**C. PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA**

Any person may address the Board during the "Public Comment" item by stating their name for the record and reason for comment. The Board may not act on any matter unless duly agendized for a future meeting.

*None*

**D. NOTICED PUBLIC HEARINGS**

**None**

**E. REGULAR BUSINESS**

**E.1 Items Removed from Consent (If any)**

*None*

**E.2 Reports and Communications**

*This time will be for Board members to ask questions regarding the provided written materials.*

**E.2.1 School Director Report**

**E.2.2 Treasurer Report**

*Michelle Yezbick presented the School Director Report, Pat Casey presented the Treasurer Report. Discussion followed.*

**E.3 Action Items**

**E.3.1 Universal Prekindergarten Planning and Implementation Grant** The Board will be asked to approve a plan for UPK at Sherwood.
**Action Requested:** Approve Plan.

*Michelle Yezbick presented Universal Prekindergarten Planning and Implementation Grant. Discussion followed. Dan LaBar motioned to approve, Karey Cooper seconded with unanimous Board approval.*

**E.3.2 Local Control Accountability Plan (LCAP)**

The Board will be asked to discuss the LCAP draft and allow for public input.
**Action Requested:** Discuss Plan.

*Michelle Yezbick presented LCAP plan and data. Discussion followed.*

*Open meeting adjourned at 6:45PM by Russell Shapiro.*

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**F. CLOSED SESSION**

**F.1. Public Employee Performance Evaluation**

With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director

*Items discussed in closed session*

**G. FUTURE AGENDA ITEMS**

The Board will be asked to adopt the 20222-2023 Local Control Accountability Plan (LCAP).

**H. ADJOURNMENT**

*Closed meeting adjourned at 7:32PM by Russell Shapiro*

As a 501(c)3 non-profit public benefit corporation, the meetings of the Sherwood Montessori Board of Directors are open to the public. An individual who requires disability-related accommodations or modifications, including auxiliary aids and services, in order to participate in the Board meeting should notify the board in writing at least 48 hours prior to the meeting. All meetings of the Board of Directors will be advertised on the school website and recorded in accordance with the Brown Act.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Contract with Mandelbaum Consulting**

**Date:** June 16, 2022

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**SUMMARY**

The School Director is requesting approval of a contract to assist with state and federal program reporting and compliance.

**DISCUSSION**

Barbara Mandelbaumfrom my position with the Butte County Office of Education after twenty years in public school education, and ten years of dedicated service to state and federal programs as an educator, coach, and county office administrator.

**ACTION REQUESTED**

Approve contract with Mandelbaum Consulting.

Attachment: Contract with Mandelbaum Consulting for 2022-2023 school year.

MANDELBAUM CONSULTING

designing effective systems for improved educational outcomes

May 19, 2022

Sherwood Montessori
Michelle Yezbick
1010 Cleveland Ave.
Chico, CA 95928

Dear Michelle,

Thank you for taking the time to discuss the compliance needs of administrative staff at Sherwood Montessori. With many years of service in educational programs and compliance, I am certain I can support Sherwood Montessori with short-term state and federal compliance solutions through technical assistance and coaching of administrative staff.

My approach focuses on developing the knowledge and skills staff need to successfully engage in compliance work in meaningful ways and the ability to implement sustainable practices for long-term success. This might include, but is not limited to a review of metrics and data analysis; root cause analysis, continuous improvement and implementation support, tool and resource development and quality control of existing documents and work flow.

I look forward to continued collaboration with your team!

# SUMMARY OF CHALLENGES

Sherwood Montessori added a significant number of duties to the administrative team with the addition of federal Title I, III and ESSER funding intended to mitigate the impact of COVID-19 on the educational program, including student loss of learning and mental health and wellness. If Sherwood Montessori is selected for Federal Program Monitoring, ensuring the school is compliant is of the utmost importance in retaining existing funding allocations.

In addition, continued expansion of state requirements, including new requirements for charter schools may lead to the need for state compliance support.

# PROPOSED SOLUTIONS & TIMELINE

**Federal Compliance**

Support the administrative team with the following Title I, Part A and ESSER requirements, as requested:

1. Monitor and report to the Director, or designee, federal program updates, as released
2. As requested, and prioritized by Sherwood Montessori, provide coaching and/or technical assistance on, but not limited to the following federal program requirements:
    a. educational partner (stakeholder) feedback and inclusion in the decision-making process *****
    b. development of a comprehensive needs assessment; monitoring implementation and effectiveness of goals and actions, including student groups *****
    c. policy review for non-compliance and recommended language for revisions
    d. development and/or review of federal reports to ensure compliance
    e. coaching and technical assistance on use of the Compliance Monitoring Tool for evidence request collection

**State Compliance**

As requested, and prioritized by the administrative team:

1. Provide coaching on priorities for the development of state mandated reports.

Items delineated with an asterisk (*) can often be paid with restricted funding.

# ANTICIPATED RESULTS

The result will be ensuring Sherwood Montessori receives necessary information to remain compliant with state and federal funding requirements and retain the maximum funding allocations.

# Scope of Work

**A.** Monitor federal programs information releases and trainings
**B.** Conduct regularly scheduled check-ins with the Director/administrative team
**C.** Provide training and technical assistance as requested
**D.** Other duties as requested

**Dates for Service(s):**
2022-2023 academic year

**Work Location:**
Remote. In person, as agreed.

**Acceptance of Statement of Work**
Meetings, research, planning, and presentation are billed at $130 an hour from July 1, 2022, through June 30, 2023, and shall not exceed $3,750 without mutual written agreement. Any mutually agreed overnight travel is billed at $500 per night for the first three nights and $300 per night thereafter, or the cost of all travel, whichever is less. Invoices are mailed monthly with an itemized description of services provided.

Clients are invoiced for services within one week of completion of service for projects concluding within less than 30 days. Multi-month projects are billed monthly, as agreed upon in the *Acceptance of Statement of Work* section above. The client shall be billed for any scheduled work canceled with less than 24-hour notice. Payment is due upon receipt of the invoice. This contract may be terminated by either party at any time with 30 days' written notice. The Client, as the primary decision-maker for the organization, assumes all legal, fiscal, and compliance responsibility for final work products.

**All invoices shall be sent to the following client contact:**
Name: Michelle Yezbick
Email Address: michelle@sherwoodmontessori.org

**All checks shall be made payable to:**
Mandelbaum Consulting and/or
Barbara Mandelbaum

**All payments should be mailed to:**
Mandelbaum Consulting
5378 CR 292 E
Kilgore, TX 75662

IN WITNESS WHEREOF, the parties hereto have caused the *Statement of Work* to be effective as of July 1, 2022.

May 19, 2022

Barbara Mandelbaum, Owner
Mandelbaum Consulting

Michelle Yezbick
Sherwood Montessori

Date of Board Approval _____

To: Board of Directors

From: Marta Taylor, SMPO Public Relations Coordinator
Subject: Sherwood Montessori Parents Organization

Report Date: May 19, 2022

This is my last report for the school year, it has been a pleasure to serve for our wonderful school. This is also my last year in SMPO and even though it was a lot of work I wouldn't change it for the world.

Our last community event was the variety show, we held it outside at 1010 Cleveland. It was a nice picnic style event with lots of attendance. We had 23 participants all with very unique shows. From our snack bar we raised $480 ($150 from PE plant sale)  with that money. In addition to our already budgeted money we were able to host a buffet/ unique sandwich bar for our staff, we also got every staff (37) a plant and a Dutch Bros gift card!

Parents also helped to host a breakfast bar for our staff full of yummy things.

Lastly, bike to school day was hosted by our amazing PE teacher, we had lots of riders.

Last thing to plan is the promised pizza party to our class with the most volunteer hours.

That's all for the year, Board, thank you for everything you do for our school and children.

Best regards,

SMPO

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **School Director Report**

**Date:** June 16, 2022

---

**Administrative**

- Summer school's first session began on June 13th and will serve 40 students. The program's second session will also serve 40 students and begins on July 11th. Brenda Brown is the lead, and she has Sherwood instructional aides to staff the program. About 10 students are currently on the wait list for summer school.
- We are still seeking a new School Psychologist for the 2022-2023 school year. If we are unable to hire by late July, we will reach out to our SELPA for a suggestion to go forward in using a company to contract for the position rather than continuing to attempt to hire an employee. Other positions we will hire for include some new instructional aides for classrooms and paid interns from the BSW and MSW programs at California State University for mental health support, as well as a behavioral health counselor for the Learning Center. Funds previously allocated for the Director of MTSS position will be used for the mental health/behavioral support positions.
- Our campus reconfiguration is underway with phase three of the move. 1010 Cleveland will be transformed to suit our youngest students, as well as the site of the library/Extended Day/teaching kitchen.
- Sherwood was awarded the NorCal Educational Leadership Consortium of the 21st Century California School Leadership Academy to engage with this problem of practice and refine our implementation of PBIS to be more responsive to neuroatypical/neurodiverse students.
- The end of year was busy for teachers with assessment, report cards, and celebrations. Teachers are now enjoying a well-deserved break after a year like no other!
- Our graduation ceremony was especially sweet and poignant as several members of the eighth grade class had been with Sherwood since kindergarten and others were with us for at least four years. We incorporated a "Moving Up" ceremony where the eldest members of each classroom who will be moving up to the next level were recognized. Students sang *I Am You from the Future*, an original song developed for the graduation event in 2021 by teacher Anne Adams, and a recording can be seen on our Facebook page.

**Safety**

- Security cameras have been ordered with Measure K funds to cover all areas of main campus and 1010.
- A locking gate will be installed over the summer break for the 1010 campus.

**Legislative/Legal/Compliance**

- ADA hold harmless is not specifically included in AB 154 but is expected to be included in a subsequent Education Trailer Bill. The Legislature's proposal would limit hold harmless protections for charter schools to only classroom-based schools and only for the 2021-22 school year.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

**Subject:** **Agenda Item, Treasurer's Report**

**Date:** June 16, 2022 Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of May 2022 reconciled with and matched those of the school's internal reports. The New Balance totaled $ 638,573.99 as of May 31, 2022 for the checking account and $50,000 in the special account which has now been moved back to the checking account in June.
- There were no unexpected high-cost expenses in May.

Profit & Loss

- The May Profit & Loss report shows a Net Income of -$87,064 and a YTD of -$566,642, which is offset by May LCF funds totaling $ 13,850 deposited in June along with State Grant funds of $10,000 for ELOP.

Cash Flow

- Assuming all Federally allocated funds are received and Annual ADA is at least 100, the school is projected to end the year with a positive cash balance.

| | May 31, 22 |
|---|---|
| **ASSETS** | |
| **Current Assets** | |
| **Checking/Savings** | |
| **9100-Assets** | 585,911 |
| **Total Checking/Savings** | 585,911 |
| **Accounts Receivable** | |
| **9200-Accounts Receivable** | 10,677 |
| **Total Accounts Receivable** | 10,677 |
| **Other Current Assets** | |
| **9290 - Due from Grantor Govts.** | -47,156 |
| **9340-Security Deposit** | 50,000 |
| **Total Other Current Assets** | 2,844 |
| **Total Current Assets** | 599,432 |
| **Fixed Assets** | |
| **9410 - Land** | 95,000 |
| **9430- Building** | 182,515 |
| **9435-Accumulated Depreciation** | -21,786 |
| **Total Fixed Assets** | 255,729 |
| **TOTAL ASSETS** | **855,161** |
| **LIABILITIES & EQUITY** | |
| **Liabilities** | |
| **Current Liabilities** | |
| **Accounts Payable** | |
| **9500-Accounts Payable** | 242 |
| **Total Accounts Payable** | 242 |
| **Credit Cards** | |
| **SHERWOOD COSTCO VISA** | -3,119 |
| **Total Credit Cards** | -3,119 |
| **Other Current Liabilities** | |
| **9500-Liabilities** | 215,464 |
| **Total Other Current Liabilities** | 215,464 |

| | May 31, 22 |
|---|---|
| Total Current Liabilities | 212,587 |
| Total Liabilities | 212,587 |
| Equity | |
| Restricted Assets | 364,551 |
| Unassigned/Unappropriated | 845,867 |
| Net Income | -567,844 |
| Total Equity | 642,574 |
| TOTAL LIABILITIES & EQUITY | 855,161 |

# Sherwood Montessori
## Profit & Loss YTD Comparison
May 2022

| | May 22 | Jul '21 - May 22 |
|---|---|---|
| **Ordinary Income/Expense** | | |
| **Income** | | |
| **8000-Revenues** | 110,349 | 1,169,215 |
| **Total Income** | 110,349 | 1,169,215 |
| **Gross Profit** | 110,349 | 1,169,215 |
| **Expense** | | |
| **1000 Certificated Salaries** | 59,668 | 593,355 |
| **2000 Classified Salaries** | 53,800 | 453,351 |
| **3000-Employee Benefits** | 32,412 | 318,630 |
| **4000-Books and Supplies** | 3,586 | 75,853 |
| **5000 Services/Other Op. Exp.** | 49,149 | 295,871 |
| **Total Expense** | 198,615 | 1,737,060 |
| **Net Ordinary Income** | -88,266 | -567,844 |
| **Net Income** | **-88,266** | **-567,844** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**May 2022**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 05/02/2022 | DBT | Vang's Plants and Suc... | Plants | Office Supplies | 198.41 |
| Check | 05/02/2022 | DBT | Amazon.com | LAMINATING PLASTIC PA... | Office Supplies | 23.90 |
| Check | 05/02/2022 | DBT | Office Depot | SUPPLIES | Office Supplies | 157.49 |
| Check | 05/02/2022 | DBT | Indeed | Ad for job position | Advertising | 50.00 |
| Check | 05/02/2022 | DBT | Facebook Ads | AD - RM | Advertising | 25.00 |
| Check | 05/03/2022 | DBT | FoodMaxx | Snacks - BIKE TO SCHOOL... | Food (Instructional) | 13.94 |
| Check | 05/03/2022 | 9420 | Kellie Sutterfield | Monthly pesticide service (G... | Pest Control | 85.00 |
| Check | 05/03/2022 | 9421 | Barbara Mandelbaum | Federal funding allocation - I... | Grant Services | 320.00 |
| Check | 05/03/2022 | EFT | Heather Fisher | MILEAGE | 5200-Travel and Conf... | 29.97 |
| Check | 05/04/2022 | 9422 | E-rate Advisors | INV - 1536Q4 | Contracted Service | 375.00 |
| Check | 05/04/2022 | 9423 | Advanced Document | inv71561 | Copier Lease | 681.96 |
| Check | 05/04/2022 | 9424 | Richard Hirshen | Teaching Service | Contracted Service | 385.00 |
| Check | 05/04/2022 | 9425 | Richard Hirshen | Teaching supplies | Food (Instructional) | 60.13 |
| Check | 05/04/2022 | 9427 | Southern Oregon Univ... | Workshops - Ck 9426 CAN... | Field Trips and Asse... | 560.00 |
| Check | 05/04/2022 | 9428 | Eric . Parish | Soccer camp | Contracted Service | 320.00 |
| Check | 05/04/2022 | EFT | Kimberly Fellner [other} | SOIL | Instructional Supplies | 17.14 |
| Check | 05/04/2022 | DBT | Amazon.com | PERIER BEADS-CRAFT IN... | Office Supplies | 34.31 |
| Check | 05/04/2022 | DBT | Facebook Ads | AD - RM | Advertising | 35.00 |
| Check | 05/05/2022 | DBT | Costco | SNACKS | Food (Instructional) | 313.96 |
| Check | 05/05/2022 | DBT | Amazon.com | LONG REACH STAPLER | Office Supplies | 17.15 |
| Check | 05/06/2022 | EFT | California Water Servi... | APRIL SERVICE | Water | 39.53 |
| Check | 05/06/2022 | EFT | Comcast 4454 | SERVICE - APRIL/MAY | Internet Service Provi... | 228.41 |
| Check | 05/06/2022 | EFT | Harry Yasko | PRINTER INK CARTRIDGES | Instructional Supplies | 73.20 |
| Check | 05/06/2022 | DBT | 1 & 1 Internet Inc. | Internet hosting- 3MO. MAY-... | Website, Hosting | 45.00 |
| Check | 05/06/2022 | DBT | Office Depot | MOVING BOXES - LCAP | Office Supplies | 99.07 |
| Check | 05/06/2022 | DBT | Facebook Ads | AD - RM | Advertising | 10.65 |
| Check | 05/07/2022 | DBT | Amazon.com | 2 HOLE PUNCH | Office Supplies | 13.51 |
| Check | 05/08/2022 | DBT | Amazon.com | SECURE PEN-CHAIN-HOL... | Office Supplies | 13.93 |
| Check | 05/09/2022 | EFT | HP LEASE 7603 | Lease Payment - Customer ... | HP DIRECT LEASE | 316.21 |
| Check | 05/09/2022 | DBT | Office Depot | MOVING BOXES - LCAP fa... | Office Supplies | 88.93 |
| Cre... | 05/09/2022 | | Microsoft | Subscription - MONTHLY | Software Licensing | 9.75 |
| Check | 05/09/2022 | DBT | Neacail Murdock | MOVE CLASSROOMS | Contracted Service | 92.00 |
| Check | 05/09/2022 | DBT | Enterprise Rent-A-Car ... | ASHLAND FIELD TRIP | 5200-Travel and Conf... | 202.80 |
| Check | 05/09/2022 | DBT | Enterprise Rent-A-Car ... | ASHLAND FIELD TRIP | 5200-Travel and Conf... | 669.82 |
| Cre... | 05/10/2022 | | University Box Office | FIELD TRIP - MAY 12TH | Instructional Supplies | 154.00 |
| Check | 05/11/2022 | EFT | Waste Management | Service 2022 APRIL | Trash/Recycling | 128.68 |
| Check | 05/11/2022 | 9429 | Hernandez Cleaning S... | INV 47454 | Housekeeping Services | 4,750.00 |
| Check | 05/11/2022 | 9430 | ADAM SCHALLER DB... | PSYCH - WM MARCH | Contracted Service | 400.00 |
| Check | 05/11/2022 | 9431 | CUSD | 2022 FUA - INV 22-00165 | CUSD FUA Charges | 2,577.92 |
| Check | 05/12/2022 | 9432 | Office Depot | SUPPLIES | Office Supplies | 76.08 |
| Check | 05/12/2022 | DBT | NATIONAL CENTER F... | ORDER 29012 | Advertising | 120.00 |
| Check | 05/13/2022 | 9433 | David Durosier | Haitian dance lessons - AP... | Contracted Service | 2,000.00 |
| Check | 05/13/2022 | 9434 | Carly DeMartini | ADAPTIVE PE - Independan... | SELPA | 640.00 |
| Check | 05/13/2022 | DBT | Neacail Murdock | MOVE CLASSROOMS | Contracted Service | 161.16 |
| Check | 05/13/2022 | 9435 | MEMORY BOOK COM... | YEARBOOK | Contracted Service | 1,638.20 |
| Check | 05/15/2022 | DBT | Amazon.com | Zen monkey slack line kit | Instructional Supplies | 104.24 |
| Check | 05/15/2022 | ACH | COSTCO VISA CARD | 2022 15TH PURCHASES A... | SHERWOOD COSTC... | 4,627.57 |
| Check | 05/16/2022 | 7322 | Sarah Kane | LIVESCAN - REPLACES C... | LiveScan and TB Tes... | 64.00 |
| Check | 05/16/2022 | DBT | Costco | SNACKS | Food (Instructional) | 487.91 |
| Check | 05/16/2022 | DBT | USPS | Mailing | Postage | 23.76 |
| Check | 05/16/2022 | DBT | Facebook Ads | AD - RM | Advertising | 19.46 |
| Check | 05/16/2022 | DBT | Facebook Ads | AD - RM | Advertising | 50.00 |
| Check | 05/17/2022 | DBT | Amazon.com | Push pins | Instructional Supplies | 8.57 |
| Check | 05/17/2022 | DBT | Amazon.com | Supplies | Instructional Supplies | 118.04 |
| Check | 05/17/2022 | DBT | Wufoo | MAY SERVICE | Online List Managem... | 19.00 |
| Check | 05/17/2022 | DBT | Magoon Signs | advertising INV-46491 | Advertising | 128.70 |
| Check | 05/17/2022 | DBT | Chico Area Recreation... | 1 picnic site | Other Rentals | 150.00 |
| Check | 05/18/2022 | EFT | PG & E | April Service | Electricity | 320.60 |
| Check | 05/18/2022 | EFT | Comcast Business 9110 | MAY-JUNE Service | Internet Service Provi... | 308.83 |
| Check | 05/18/2022 | 9436 | Comcast Ethernet | MAY Service-2742 | Ethernet - Fiberoptic | 278.04 |
| Check | 05/19/2022 | 9437 | Parsec Education | Parsec GO dashboard | Contracted Service | 4,110.00 |
| Check | 05/19/2022 | ACH | HP LEASE 7603 | Lease Payment - Customer ... | HP DIRECT LEASE | 316.21 |
| Check | 05/20/2022 | EFT | Achieve Charter Scho... | INV 3575 DOC SERVICE - ... | 9590 - Other Accts P... | 250.00 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 05/20/2022 | 9438 | Chico Country Day | NATALIE WREN - NURSE -... | Contracted Service | 1,242.47 |
| Check | 05/20/2022 | 9439 | HM&S | 2020 Federal and California ... | Auditing and CPA Ser... | 1,500.00 |
| Check | 05/20/2022 | 9439 | HM&S | 6-30-21 Financial liability | Auditing and CPA Ser... | 9,650.00 |
| Check | 05/20/2022 | DBT | TEA BAR CAFE | Meal - UE Meeting #2 | LCAP | 79.93 |
| Check | 05/20/2022 | DBT | Beatniks | Meeting with montessori chil... | Food - Meetings | 11.00 |
| Check | 05/23/2022 | EFT | Jessica Lusardi | Supplies | Instructional Supplies | 214.58 |
| Check | 05/23/2022 | 9440 | Marta Taylor | Teacher appreciation day gr... | Food - Meetings | 121.99 |
| Check | 05/23/2022 | DBT | Michaels | 9x12 acrylic | Instructional Supplies | 19.28 |
| Check | 05/23/2022 | DBT | Amazon.com | MONTHLY MEMBERSHIP F... | 5300-Dues and Mem... | 16.08 |
| Check | 05/24/2022 | DBT | Macquarie Equipment ... | Kyocera Copier Lease - INV... | Copier Lease | 220.94 |
| Check | 05/24/2022 | DBT | Costco | Snacks | Food (Instructional) | 336.58 |
| Check | 05/26/2022 | DBT | PANERA BREAD | UE Meeting #2 | Food - Meetings | 30.67 |
| Check | 05/27/2022 | DBT | Costco | Food for graduation | Food - Meetings | 53.36 |
| Check | 05/27/2022 | DBT | Costco | Snacks | Food (Instructional) | 245.05 |
| Check | 05/27/2022 | DBT | Neacail Murdock | MOVE CLASSROOMS | Contracted Service | 207.50 |
| Check | 05/27/2022 | DBT | Heather Fisher | MILEAGE | 5200-Travel and Conf... | 10.87 |
| Check | 05/27/2022 | DBT | Feather River Center | PEARCE CLASS FIELD TRIP | Field Trips and Asse... | 250.00 |
| Bill | 05/31/2022 | | Pat Casey | CONTRACT SERVICE - MA... | Business Manager S... | 4,000.00 |
| Check | 05/31/2022 | DBT | Amazon.com | Door stopper | LCAP | 46.44 |
| Check | 05/31/2022 | DBT | Office Depot | 6 pack of doc covers | Office Supplies | 47.17 |
| Check | 05/31/2022 | DBT | Costco | Snacks | Food (Instructional) | 306.19 |
| Check | 05/31/2022 | DBT | Neacail Murdock | MOVE CLASSROOMS | Contracted Service | 846.60 |
| **TOTAL** | | | | | | **49,093.84** |

# Sherwood Montessori
## Board of Directors - Donations and Fundraising Report
### May 2022

| Type | Date | Memo | Amount |
|---|---|---|---|
| **8000-Revenues** | | | |
| **8600-8799 Other Local Revenue** | | | |
| **8699-Fundraising and Donations** | | | |
| **8699-Field Trip Donations** | | | |
| **Ashland Trip** | | | |
| Deposit | 05/13/2022 | ASHLAND FUNDRAISER | 546 |
| Deposit | 05/13/2022 | MONICA RODRIQUEZ- JAVIER GARCIA | 200 |
| Deposit | 05/23/2022 | ASHLAND FIELD TRIP PAYPAL | 23 |
| Total Ashland Trip | | | 769 |
| Total 8699-Field Trip Donations | | | 769 |
| **8699-Fundraising** | | | |
| **8673-Rebates** | | | |
| Deposit | 05/27/2022 | SMILE | 13 |
| Total 8673-Rebates | | | 13 |
| **8699-Fundraising - Other** | | | |
| Deposit | 05/13/2022 | BOX TOPS | 5 |
| Deposit | 05/13/2022 | CAL SKATE - PE | 181 |
| Deposit | 05/13/2022 | PE FUNDRAISER | 150 |
| Deposit | 05/13/2022 | SMPO TEACHER APPRECIATION | 295 |
| Deposit | 05/13/2022 | PANDA EXPRESS GARDEN FUNDRAISER | 97 |
| Total 8699-Fundraising - Other | | | 728 |
| Total 8699-Fundraising | | | 741 |
| **Classroom donation** | | | |
| Deposit | 05/23/2022 | APRIL FIELD TRIP PAYPAL | 19 |
| Total Classroom donation | | | 19 |
| Total 8699-Fundraising and Donations | | | 1,529 |
| Total 8600-8799 Other Local Revenue | | | 1,529 |
| Total 8000-Revenues | | | 1,529 |
| **TOTAL** | | | **1,529** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **2022-2023 Original Budget**

**Date:** June 16, 2022

---

**SUMMARY**

The Budget Committee met on June 9th to create the draft of the original budget for 2022-2023.

**DISCUSSION**

Assumptions for creating the proposed budget included:
Governor's Proposal assumed to be accepted by Legislature
Budget based on 112 ADA
5% raise for all employees, base rate for hourly up from $16.00 to $18.50
$90,000 of grant funds as ongoing revenue, estimated offset by expenses
One time fiber optic equipment cost of $10,000
Certificated salary costs down by two positions
$9,000 cost increase for custodial services due to summer program

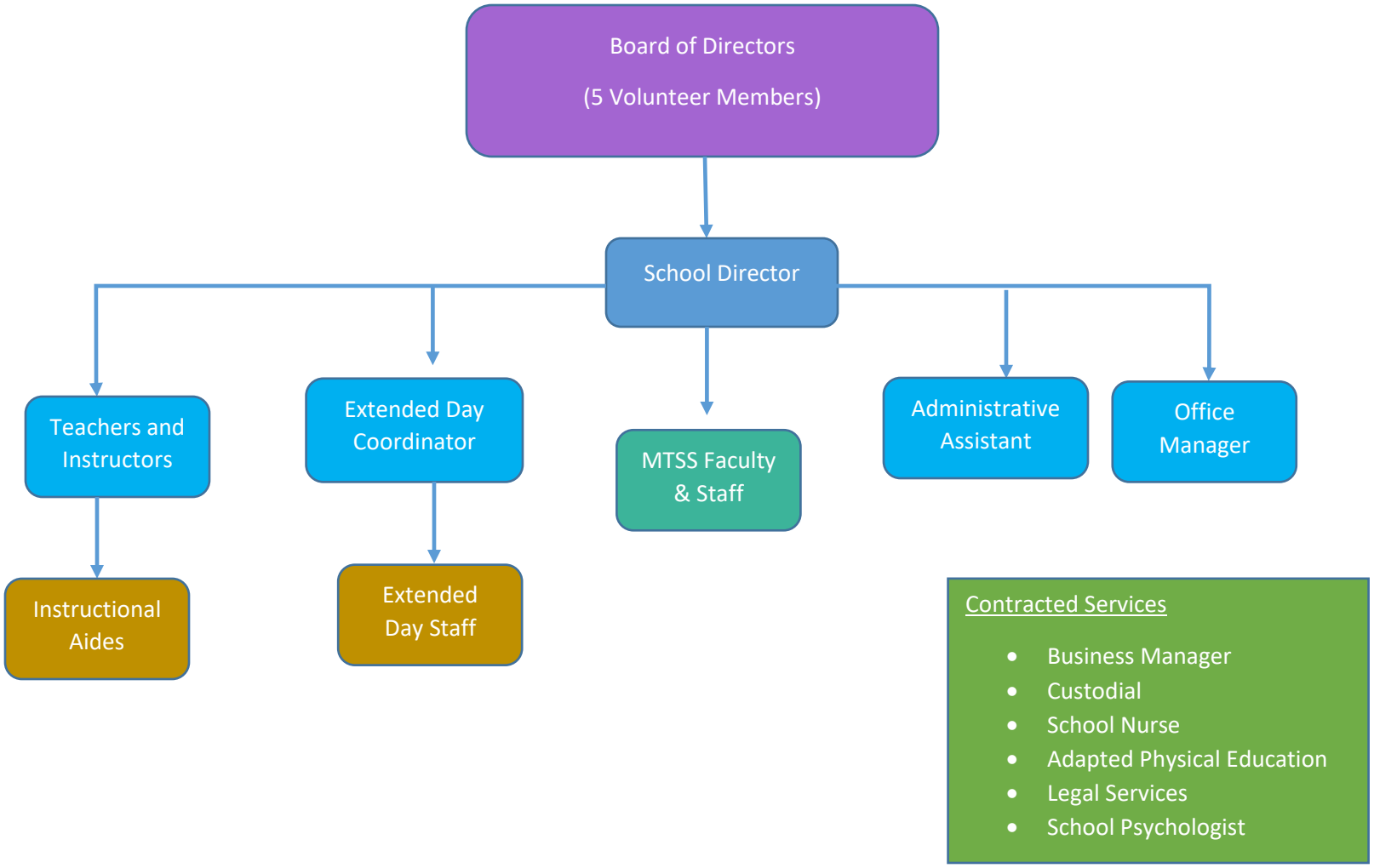
**ACTION REQUESTED**

Adopt 2022-2023 Original Budget

Attachments: Draft of 2022-2023 Original Budget, Organizational Chart

| 2022-23 | FUNDING AT 100 ADA | FUNDING AT 112 ADA | | | |
|---|---|---|---|---|---|
| ORIGINAL | 2021-22 2ND INTERIM BUDGET | 2022-23 ORIGINAL BUDGET | CHANGE | | |
| **Revenue** | | | | | |
| 8011 Local Control Funding | 445,667 | 590,553 | | | |
| 8012 Education Protection Act | 250,455 | 284,969 | | | |
| 8096 In Lieu Taxes | 261,945 | 261,945 | | | |
| Subtotal LCFF Revenues | ***958,067*** | ***1,137,467*** | ***179,400*** | | |
| 8290 - ELO/IPI 20/21-21/22 | 74,000 | | (74,000) | | |
| 8290 - ESSER II-3212 | 28,511 | | | | |
| 8290 - ESSER III-3213 | 50,091 | ***40,000*** | | | |
| 8290 - ESSER III-3214 | 12,523 | ***10,000*** | | | |
| 80XX - ESSER | 91,125 | 50,000 | (41,125) | | |
| 8181 Spec. Educ.- SELPA Fed | 6,000 | 6,000 | - | | |
| 8311 Spec. Educ. - SELPA State | 95,000 | 80,000 | (15,000) | | |
| 8312 Spec. Educ. - SELPA ERMHS | 3,000 | 3,000 | - | | |
| 8550 Mandates Block Grant | 2,500 | 2,500 | - | | |
| 8560 State Lottery | 30,000 | 30,000 | - | | |
| 8590 - Educator Effectiveness-6266 | 44,934 | ***20,000*** | (24,934) | | |
| 8290 - ELOP 21-22 - 2600 | 50,000 | ***20,000*** | (30,000) | | |
| 8699 Other Local Revenue | 3,000 | 3,000 | - | | |
| **TOTAL REVENUES** | **1,357,626** | **1,351,967** | ***(5,659)*** | | |
| **Expense** | | | | | |
| 1000 Certificated Salaries | 562,694 | 521,600 | (41,094) | | 31% |
| 2000 Classified Salaries | 478,103 | 442,932 | (35,171) | | 27% |
| 3000 Employee Benefits | 309,907 | 311,609 | 1,702 | | 19% |
| **SUBTOTAL** | ***1,350,704*** | ***1,276,141*** | (74,563) | | 76% |
| 4100 Texts and Core Curricula | 12,000 | 3,000 | (9,000) | | |
| 4200 Reference Materials | 3,000 | 3,000 | - | | |
| 4300 Materials and Supplies | 60,000 | 24,250 | (35,750) | | |
| 4400 NonCap Equipment | 4,000 | 4,000 | - | | |
| 4700 Food (Nutrition) | 500 | 10,000 | 9,500 | | |
| **SUBTOTAL** | ***79,500*** | ***44,250*** | (35,250) | | 3% |
| 5200 Travel and Conferences | 2,000 | 3,000 | 1,000 | | |
| 5300 Dues and Memberships | 3,100 | 2,900 | (200) | | |
| 5400 Property/Liability Insurance | 31,000 | 35,000 | 4,000 | | |
| 5500 Operations / Housekeeping | 80,000 | 96,800 | 16,800 | | |
| 5600 Rentals, Leases, and Repairs | 13,000 | 13,600 | 600 | | |
| 5800 Prof. & Consulting Services | 160,000 | 183,024 | 23,024 | | 4% |
| 5900 Communications | 25,000 | 15,300 | (9,700) | | |
| **SUBTOTAL** | ***314,100*** | ***349,624*** | 35,524 | | 21% |
| 6200 CAPITAL OUTLAY- BLDG | | | - | | |
| **TOTAL EXPENDITURES** | **1,744,304** | **1,670,015** | **(74,289)** | | 100% |
| **Net Income** | ***(386,678)*** | ***(318,048)*** | **ADA Equiv.** | | **-32** |
| **Restricted Grant Funds** | ***104,757*** | | | | |
| **Unassigned/Unappropriated - Prior Year** | **550,000** | **450,000** | | | |
| **Unassigned/Unappropriated - Proj. Yr End** | **58,565** | **131,952** | **ADA Equiv.** | | **13** |
| **Reserve - Economic Uncertainties** | **220,000** | **120,000** | **Est. 1 mos. salary/benes.** | | |
| **Total - Unassigned/Economic Uncertainty** | **450,000** | **11,952** | **ADA Equiv.** | | **1** |

# Sherwood Montessori Organization Chart



SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Local Control Accountability Plan (LCAP) Draft**

**Date:** June 16, 2022

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**SUMMARY**

The LCAP adoption process should have ample opportunities for a variety of educational partners to give input, including: students, parents, faculty, staff and community members.

**DISCUSSION**

The LCAP format includes a description of the process for engaging educational partners to gain input. A focus group has met to discuss our current LCAP and the course for developing our future adoption. Including the LCAP as an item at our public meetings is also a required part of the adoption process to give opportunity for stakeholder input. Sherwood requests input from parents and guardians, teachers, and staff via an annual Community Survey. The Town Hall meetings, held four times this past year via Zoom, became another vehicle for our community to give input. Students give input with a Student Survey. The draft attached here was created from survey input, data from the CDE Dashboard, local data, input from the focus group, and input given at the Regular Meeting of the Board of Directors on May 19, 2022.

**ACTION REQUESTED**

Adopt LCAP.

Attachment: DRAFT LCAP 2022-2023

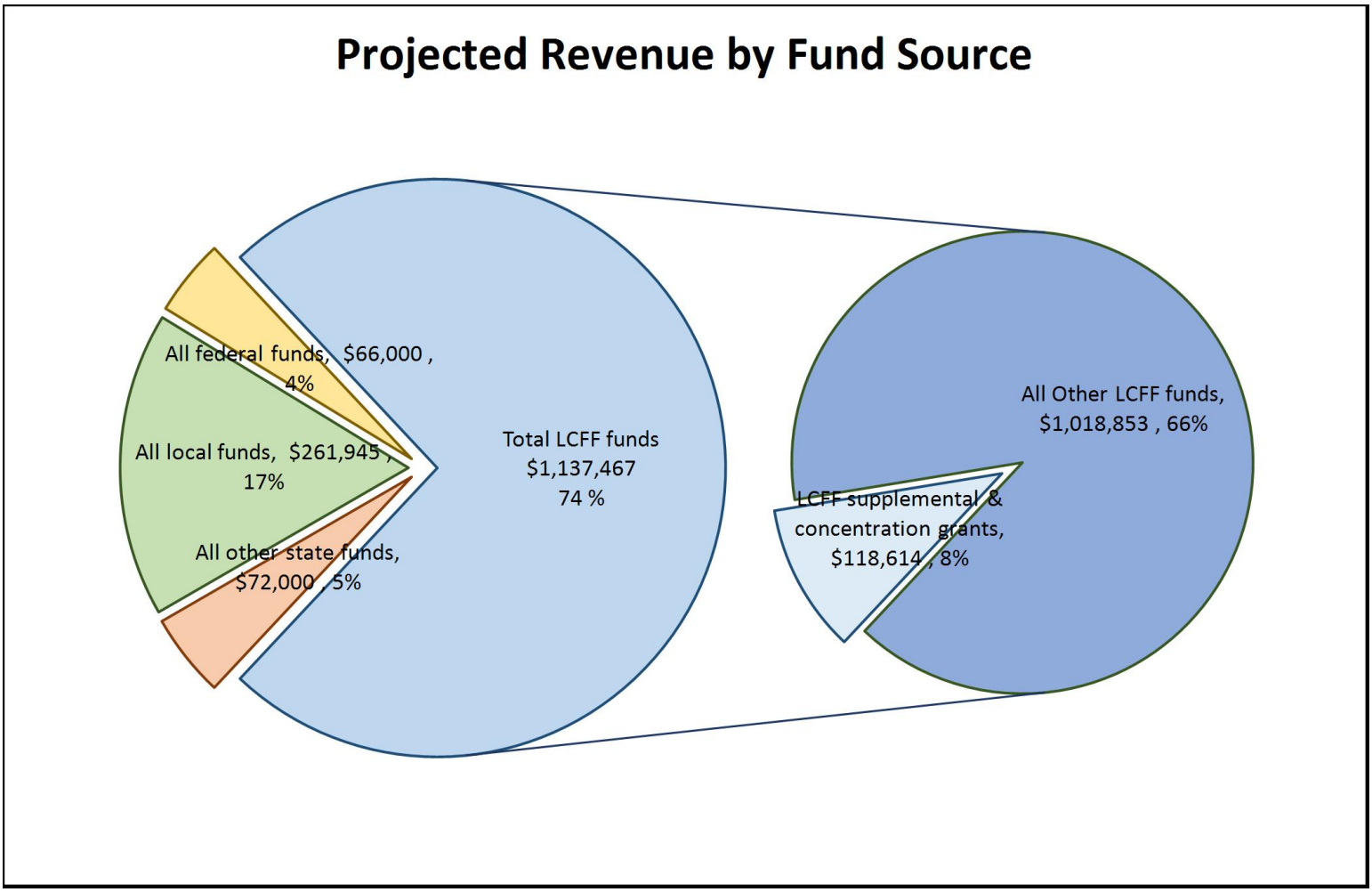
# LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sherwood Montessori
CDS Code: 04614240121475
School Year: 2022-23
LEA contact information:
Michelle Yezbick, Director

(530) 345-6600

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

# Budget Overview for the 2022-23 School Year

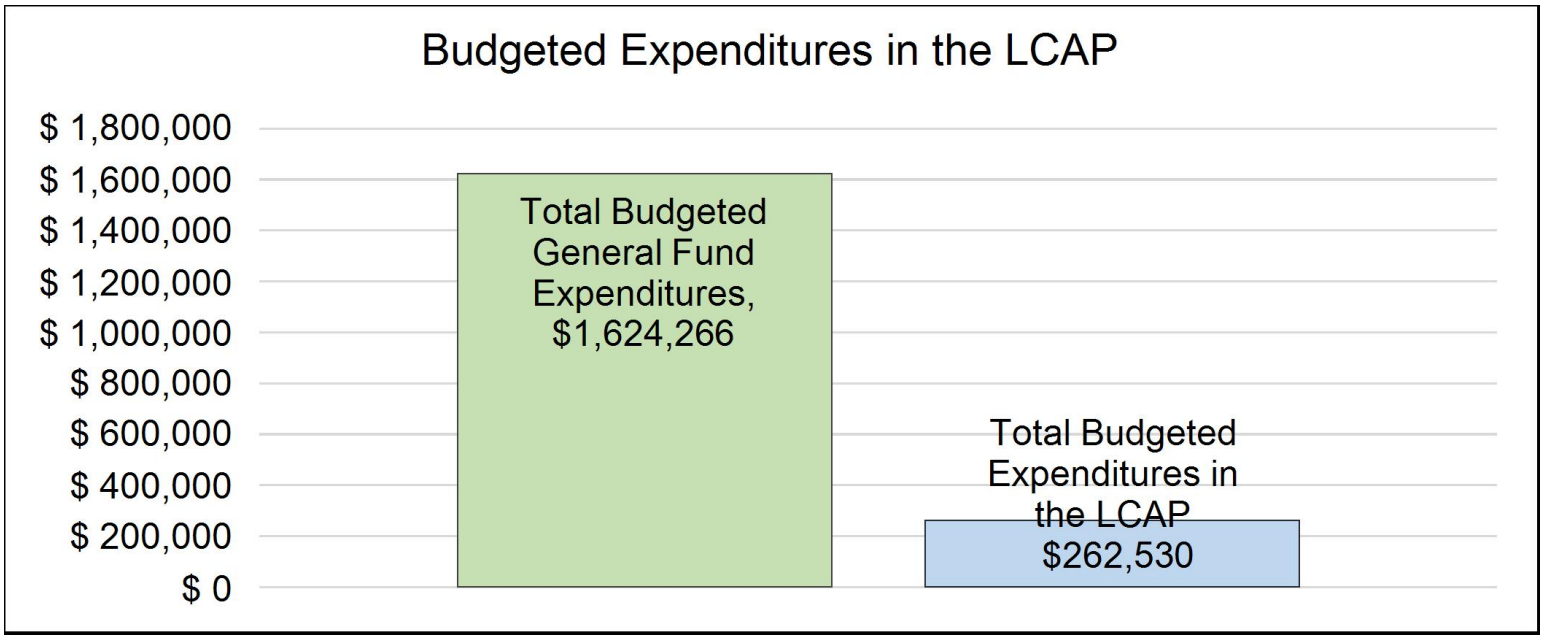



This chart shows the total general purpose revenue Sherwood Montessori expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sherwood Montessori is $1,275,467, of which $1,137,467 is Local Control Funding Formula (LCFF), $72,000 is other state funds, $261,945 is local funds, and $66,000 is federal funds. Of the $1,137,467 in LCFF Funds, $118,614 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

# LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.




This chart provides a quick summary of how much Sherwood Montessori plans to spend for 2022-23. It shows how much of the total is tied to planned actions and services in the LCAP.

The text description of the above chart is as follows: Sherwood Montessori plans to spend $1,624,266 for the 2022-23 school year. Of that amount, $$262,530.00 is tied to actions/services in the LCAP and $1,361,736 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Salary and benefits of employees and contracted services for basic program. Operations/housekeeping, and rentals, leases and repairs for basic program. Title 1 Reading Intervention program for targeted assistance for low performing pupils. Small class sizes supported by 1.5 FTE of credentialed teachers in addition to base program. Instructional aides in classrooms TK-6.

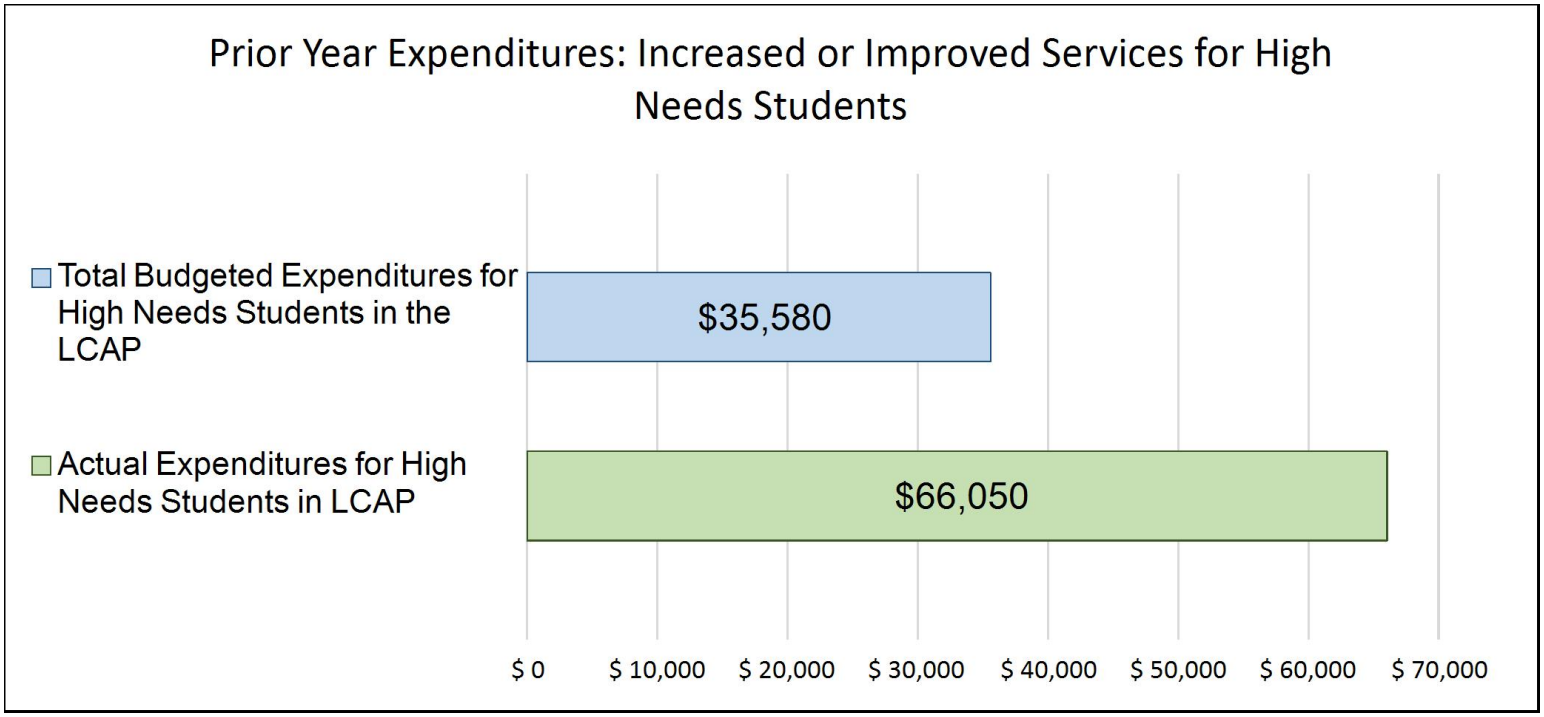
# Increased or Improved Services for High Needs Students in the LCAP for the 2022-23 School Year

In 2022-23, Sherwood Montessori is projecting it will receive $118,614 based on the enrollment of foster youth, English learner, and low-income students. Sherwood Montessori must describe how it intends to increase or improve services for high needs students in the LCAP. Sherwood Montessori plans to spend $118,614 towards meeting this requirement, as described in the LCAP.

In addition to benefitting from the actions that are intended for all students, high needs students will have access to free child care, a free summer program, field trips, free or reduced lunch, free healthy snacks, and free after school tutoring.

# LCFF Budget Overview for Parents

# Update on Increased or Improved Services for High Needs Students in 2021-22




This chart compares what Sherwood Montessori budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Sherwood Montessori estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2021-22, Sherwood Montessori's LCAP budgeted $35,580 for planned actions to increase or improve services for high needs students. Sherwood Montessori actually spent $66,050 for actions to increase or improve services for high needs students in 2021-22.

The difference between the budgeted and actual expenditures of $30,470 had the following impact on Sherwood Montessori's ability to increase or improve services for high needs students:

Students were able to attend a summer program, and access free tutoring after school in a free child care program. Students also were provided healthy snacks in addition to free or reduced lunch.

# Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan

| Local Educational Agency (LEA) Name | Contact Name and Title | Email and Phone |
|---|---|---|
| Sherwood Montessori | Michelle Yezbick<br>Director | michelle@sherwoodmontessori.org<br>530-345-6600 |

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. The following is a one-time mid-year report to the local governing board or body and educational partners related to engagement on, and implementation of, these Acts.

A description of how and when the LEA engaged, or plans to engage, its educational partners on the use of funds provided through the Budget Act of 2021 that were not included in the 2020–21 Local Control and Accountability Plan (LCAP).

Sherwood Montessori has an established foundational principle of meaningful educational partner engagement. These efforts were refined and improved through the Local Control and Accountability Plan (LCAP) development process. Sherwood will continue to engage community partners regarding the additional Cost-Of-Living-Adjustment (COLA) and 15% increase to concentration funds during the LCAP community partners engagement opportunities in the first half of 2022.

Previous engagement opportunities include:
Town Hall meetings, there have been two conducted this year. Community members, mostly parents and teachers, ask questions and give input about current topics and initiatives during these meetings.
Data is collected from Exit Surveys when families leave the school either for a move out of the area, to go to a non classroom-based program during the pandemic, or to seek a different educational model. These data give school leaders input regarding what was most appreciated and improvement suggestions.

Community Surveys, LCAP Focus Group work, and discussion at open public meetings were used to create the Local Control and Accountability Plan 2021-2022.

Upcoming engagement opportunities for these funds include:

Two more Town Hall meetings will be held.
Exit Surveys will continue to be offered when families leave the school.
The established procedures with Community Surveys, LCAP Focus Group work, and discussion at open public meetings will be used to create the Local Control and Accountability Plan for 2022-2023.

A description of how the LEA used, or plans to use, the additional concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.

Sherwood will use concentration grant addon funding to provide staff to offer free tutoring and care after school for students.

A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.

Sherwood used a community survey to develop its LCAP and in 2020-2021 use of one-time federal funds for COVID-19 recovery and response. The survey polled all parents, family member, teachers, staff and community members who were asked to evaluate their experiences and give input regarding what they would like to see in terms of school improvement. Student surveys are also given with questions tailored for their experiences.

During the 2020-2021 school year, input was sought for revised questions to capture the experiences of the students and families during distance learning. Focus group members analyzed the data and prepared a presentation for public meetings of the board of directors. A draft of the plan was vetted at the public meetings and the final plan is posted on the school's website.

Recruitment for the LCAP Focus Group was published in the school announcements dated March 4, March 11, March 25, April 1, and April 8, 2021. Announcements are received by all parents, staff, and teachers as well as interested community members, in email or text or both according to subscriber’s choice.

The teachers' meetings on March 9th, April 8th, and May 13th had items relating to the LCAP, including invitation to join the LCAP Focus Group, presentation of Student Surveys, and evaluation of implementation of State Standards. Teachers also had weekly or biweekly meetings with the School Director throughout the school year in which input could be given on a 1:1 basis. The Sherwood Community Survey was sent out on March 29, 2021 and was available through April 25, 2021. Invitations and reminders to complete the survey were included in the school announcements on March 29, April 1, April 8, April 15 and April 22. Paper flyers were handed out to parents by the school's administrative assistant to parents at pick up time on last day of school before the survey would close on April 25. 62 Sherwood community members (parents, teachers, staff, family members, community members) responded to the survey, the largest number of responses the school has received on such a survey. Student surveys were also filled by Sherwood's students.

The LCAP Focus Group met on April 29, 2021 and on May 10, 2021 and looked at progress made on LCAP goals as measured by the data collected. Actions and goals were examined in light of the data and decisions regarding changes to present in the draft of the LCAP at the May meeting of the Board of Directors in 2021. At the May meeting, the draft was presented and feedback was considered for the final draft which was adopted at the Regular June meeting on June 17, 2021.

This Expenditure Plan for the ESSER III funds was also presented at an open, public meeting of the board of directors with an invitation for attendees to give input on August 19, 2021 and September 16, 2021.

The current year school calendar includes four Town Hall meetings that will be held via Zoom to give stakeholders more opportunities to share their experiences and hopes for the school's programs to address safe in-person instruction and mitigation of learning loss that occurred during school closure.

Sherwood's first Town Hall was held on May 13, 2021 via Zoom to share plans for the 2021-2022 school year and solicit feedback from stakeholders. The meeting was recorded to send to all families as well as corresponding information slide presentations. The Zoom recording and slide presentations were posted on the school's homepage for potential future families to access, as well as any interested community member. This same process was followed during the current school year on September 14, 2021 and November 30, 2021. Next  Town Halls will be February 8, 2022 and April 5, 2022.

A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation.

The influx of COVID recovery money has resulted in successes in programming and student and family support. These programs include:

Sherwood's Extended Day program, counseling services and mental wellness supports, in-person learning safety procedures, and providing nutritious meals and snacks for students.

Extended Day Program
Successes: Families have access to free before school and after school care with free breakfast, snacks, enrichment activities, and tutoring. Parents and students report high levels of satisfaction with the program and it has grown since it began.
Challenges: Onerous amount of regulation and reporting required to access and track the restrictive funds. There have been fewer than 80 days since the Plan was adopted and the increased amount of time spent in meetings with compliance experts and the school's business manager take away from time that school leadership could be spending more directly impacting teaching and learning.
Lack of a guarantee of long-term support for the programs being implemented. It is difficult to hire and retain staff for programming that may not be feasible with rising costs of pension benefits and revenues tied to average daily attendance in a state with declining enrollment, to name the most concerning.
Absences of teachers, staff, and student due to COVID illness and exposures. Each time a school employee needs to isolate or quarantine, other school employees who are not out need to take time away from their regular duties to cover the duties of the absent staff. The school has continued to recruit and hire substitute employees and we've not had to close any classrooms or the grade levels due to absences, but the disruption has been significant. Student absences disrupt the effectiveness of the learning accelerations strategies as well as the strategies intended to support mental wellness.

Counseling Services and Mental Wellness Supports
Successes: Students who have accessed services have less frequent behaviors that detract from learning.
Challenges: Onerous compliance work, lack of guaranteed long-term support, and absences (described more fully above).

In-Person Learning Safety Procedures
Successes: Rapid antigen testing has been used to find positive cases to prevent outbreaks at school. School has provided masks and UV air purifiers to all classrooms and costs have been completely covered by emergency relief funds.
Challenges: Time spent to learn how to set up a testing clinic, time spent testing and reporting

Providing Nutritious Meals and Snacks for Students
Successes: Students are fed snacks daily that are provided by the school when hungry and can then focus more on learning.
Challenges: Lack of guarantee of long-term financial support for the program. Currently, the school is spending a great deal of money on snacks, but it has been covered by emergency relief funds.

A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA’s 2021–22 LCAP and Annual Update.

Sherwood Montessori used its fiscal resources to implement the requirements of the Safe Return to In-Person Instruction and Continuity Plan by providing technology, increased cleaning services, masks, and air filtration devices.
The implementation of these additional funds received in the 2021-2022 school year are specifically aligned to the LCAP by providing child care with tutoring, counseling, SEL curriculum, ABAR and trauma informed education training for teachers and staff, and cooking, gardening, dance and drumming instruction for students.
Sherwood Montessori used its fiscal resources to implement the requirements of the ESSER III Expenditure Plan by hiring substitutes to cover staff who were ill, purchasing air purifiers and PPE, providing programs and materials to address mental wellness and responding to behavior in supportive ways, and providing materials training for staff to address learning loss.
The implementation of the additional funds received in the 2021-2022 school year are specifically aligned to the LCAP by addressing basic conditions for learning by maintaining the facility, promoting pupil achievement with programming to address learning loss and promoting positive school climate, parental involvement and pupil engagement by supporting field trips, jchild care, meals and snacks, parent volunteerism, and PBIS.

# Instructions for the Supplement to the Annual Update for the 2021–22 Local Control and Accountability Plan Year

*For additional questions or technical assistance related to the completion of the Supplement to the Annual Update to the 2021–22 Local Control and Accountability Plan (LCAP), please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.*

## Introduction

California's 2021–22 Budget Act, the federal American Rescue Plan Act of 2021, and other state and federal relief acts have provided local educational agencies (LEAs) with a significant increase in funding to support students, teachers, staff, and their communities in recovering from the COVID-19 pandemic and to address the impacts of distance learning on students. Section 124(e) of Assembly Bill 130 requires LEAs to present an update on the Annual Update to the 2021–22 LCAP and Budget Overview for Parents on or before February 28, 2022, at a regularly scheduled meeting of the governing board or body of the LEA. At this meeting, the LEA must include all of the following:

- The Supplement to the Annual Update for the 2021–22 LCAP (2021–22 Supplement);
- All available mid-year outcome data related to metrics identified in the 2021–22 LCAP; and
- Mid-year expenditure and implementation data on all actions identified in the 2021–22 LCAP.

When reporting available mid-year outcome, expenditure, and implementation data, LEAs have flexibility to provide this information as best suits the local context, provided that it is succinct and contains a level of detail that is meaningful and accessible for the LEA's educational partners.
The 2021–22 Supplement is considered part of the 2022–23 LCAP for the purposes of adoption, review, and approval, and must be included with the LCAP as follows:

- The 2022–23 Budget Overview for Parents
- The 2021–22 Supplement
- The 2022–23 LCAP
- The Action Tables for the 2022–23 LCAP
- The Instructions for the LCAP Template

As such, the 2021–22 Supplement will be submitted for review and approval as part of the LEA's 2022–23 LCAP.

# Instructions

Respond to the following prompts, as required. In responding to these prompts, LEAs must, to the greatest extent practicable, provide succinct responses that contain a level of detail that will be meaningful and accessible for the LEA's educational partners and the broader public and must, to the greatest extent practicable, use language that is understandable and accessible to parents.

In responding to these prompts, the LEA has flexibility to reference information provided in other planning documents. An LEA that chooses to reference information provided in other planning documents must identify the plan(s) being referenced, where the plan(s) are located (such as a link to a web page), and where in the plan the information being referenced may be found.

**Prompt 1:** "*A description of how and when the LEA engaged, or plans to engage, its* educational partners *on the use of funds provided through the Budget Act of 2021 that were not included in the 2020–21 Local Control and Accountability Plan (LCAP).*"

In general, LEAs have flexibility in deciding what funds are included in the LCAP and to what extent those funds are included. If the LEA received funding through the Budget Act of 2021 that it would have typically included within its LCAP, identify the funds provided in the Budget Act of 2021 that were not included in the LCAP and provide a description of how the LEA has engaged its educational partners on the use of funds. If an LEA included the applicable funds in its adopted 2021–22 LCAP, provide this explanation.

**Prompt 2:** "*A description of how LEA used, or plans to use, the concentration grant add-on funding it received to increase the number of staff who provide direct services to students on school campuses with an enrollment of students who are low-income, English learners, and/or foster youth that is greater than 55 percent.*"

If LEA does not receive a concentration grant or the concentration grant add-on, provide this explanation.

Describe how the LEA is using, or plans to use, the concentration grant add-on funds received consistent with California *Education Code*

Section 42238.02, as amended, to increase the number of certificated staff, classified staff, or both, including custodial staff, who provide direct services to students on school campuses with greater than 55 percent unduplicated pupil enrollment, as compared to schools with an enrollment of unduplicated students that is equal to or less than 55 percent.

In the event that the additional concentration grant add-on is not sufficient to increase the number of staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, describe how the LEA is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

**Prompt 3:** "*A description of how and when the LEA engaged its educational partners on the use of one-time federal funds received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on pupils.*"

If the LEA did not receive one-time federal funding to support recovery from the COVID-19 pandemic and the impacts of distance learning on students, provide this explanation.

Describe how and when the LEA engaged its educational partners on the use of one-time federal funds it received that are intended to support recovery from the COVID-19 pandemic and the impacts of distance learning on students. See the COVID-19 Relief Funding Summary Sheet web page (https://www.cde.ca.gov/fg/cr/relieffunds.asp) for a listing of COVID-19 relief funding and the Federal Stimulus Funding web page (https://www.cde.ca.gov/fg/cr/) for additional information on these funds. The LEA is not required to describe engagement that has taken place related to state funds.

**Prompt 4:** "A description of how the LEA is implementing the federal American Rescue Plan Act and federal Elementary and Secondary School Emergency Relief expenditure plan, and the successes and challenges experienced during implementation."

If an LEA does not receive ESSER III funding, provide this explanation.

Describe the LEA's implementation of its efforts to maintain the health and safety of students, educators, and other staff and ensure the continuity of services, as required by the federal American Rescue Plan Act of 2021, and its implementation of the federal Elementary and Secondary School Emergency Relief (ESSER) expenditure plan to date, including successes and challenges.

**Prompt 5:** "A description of how the LEA is using its fiscal resources received for the 2021–22 school year in a manner that is consistent with the applicable plans and is aligned with the LEA's 2021–22 LCAP and Annual Update."

Summarize how the LEA is using its fiscal resources received for the 2021–22 school year to implement the requirements of applicable plans in a manner that is aligned with the LEA's 2021–22 LCAP. For purposes of responding to this prompt, "applicable plans" include the Safe Return to In-Person Instruction and Continuity of Services Plan and the ESSER III Expenditure Plan.

California Department of Education
November 2021

# Local Control Accountability Plan

**The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.**

| Local Educational Agency (LEA) Name | Contact Name and Title | Email and Phone |
|---|---|---|
| Sherwood Montessori | Michelle Yezbick, Director | michelle@sherwoodmontessori.org<br>(530) 345-6600 |

# Plan Summary [2022-23]

## General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

The mission of Sherwood Montessori is to educate TK-8 students of the greater Chico area by providing Montessori education within the context of mutual respect and joy. The focus of the education is on engaging critical thinking and fostering empathy, and developing the skills needed to become competent, responsible citizens who are life-long learners and skillful problem solvers.
The school serves our community by providing a rich and supportive educational environment for children based upon the philosophy of Maria Montessori which allows each child to reach his or her own potential academically, personally, and socially and focuses on educating the whole child intellectually, physically, and psychologically. The methodology used develops a firm foundation for the students, and emphasizes ethics, initiative, persistence, and self-confidence.
Our mission is accomplished by a concerted community-based effort between the school, the parents, and the individual child.

Sherwood currently serves 115 students with multi-age groups. We have one classrooms with learners ages 4-6 (one TK/K class), three classrooms with learners 6-9 years old (1st/2nd/3rd), two classrooms with learners 9-12 years old (4th/5th/6th), and one classroom with 12-14 year old learners (7th/8th). A Learning Center classroom serves students from all grades with specialized academic needs.

The main campus of Sherwood Montessori is located on the north side of Chapman Elementary campus, with an auxiliary campus located at 1010 Cleveland Ave. The main campus currently includes seven classrooms and an office; 20th Street Park connects the two campuses. Through funds available from the Measure K bond, Sherwood has been able to complete a construction project to install three classrooms at the 1010 site. In the 2022-2023 school year, two TK/K classrooms will move to classrooms located at 1010 with the third classroom housing the school's library and before and after school child care with tutoring after school.

This LCAP also serves as the school's Single Plan for Student Achievement (SPSA) with Title 1 funds herein accounted for. The process used to create this plan satisfies all requirements for creating a SPSA under Title 1.

# Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

Community survey results indicate that a high number of parents felt satisfied or very satisfied with the opportunity the school provided to make an impact in academic outcomes for students, a new question this year satisfying the California Department of Education's requirements for LEAs to use data and self-reflection to analyze efforts to implement Priority 3: Parental Involvement and Family Engagement. Other gains were seen in satisfaction for the curriculum in terms of Montessori authenticity and the support given to struggling learners. The free Extended Day (child care) with tutoring program also had positive responses.
From the students, the highest rated areas overall were feeling safe at school, the respect and kindness they received from their teachers, and feeling a part of the community.

# Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

Satisfaction fell the most in three areas: satisfaction in terms of respectfulness and inclusivity, the school's approach to discipline and conflict resolution using PBIS, and teachers. Qualitative input gleaned from narrative survey responses and input given in meetings indicated that the PBIS program and the decline in satisfaction in terms of respectfulness and inclusivity were related in that PBIS celebrations for students with positive behavior were not accessible for students who struggled with regulating their behavior because of disabilities or trauma. The decline in satisfaction with teachers had largely to do with the loss of two beloved teachers who had been with the school for many years. In a small school, with seven classroom teachers, a change of two teachers is impactful. It was also noted in feedback that both teachers that were lost were People of Color. With a diverse community of students and families, the loss of faculty who were from diverse backgrounds was disappointing.

From the students, the lowest rated areas overall were respect and kindness shown by other students, the enrichment classes (art, music, gardening, Spanish), and the help received to resolve conflicts with other students.

# LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

An analysis of the educational partners' feedback indicates that our efforts to provide free childcare with tutoring is appreciated and these programs should continue. Our community would value continued refinement of the way that the school supports students with challenges to emotional regulation. Improvements in the responses to behavior in our discipline program would increase the perception of inclusivity and improve relationships between the students. Providing counseling this year was a step in the right direction. Actions in the LCAP related to focus goal 1.5 will increase the capacity of existing staff to respond in helpful ways to children who are dysregulated emotionally, which in turn will allow more time for teaching and learning.

# Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

## *Schools Identified*

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Sherwood is not eligible for CSI.

## *Support for Identified Schools*

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

N/A

## *Monitoring and Evaluating Effectiveness*

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

N/A

# Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Recruitment for the LCAP Focus Group was published in the school announcements dated February 10, February 17, February 24, March 3, March 10 and March 24. Announcements are received by all parents, staff, and teachers as well as interested community members, in email or text or both according to subscriber's choice.

The teachers' meeting on March 8th and April 7th had items relating to the LCAP, including invitation to join the LCAP Focus Group, planning for Student Surveys, and evaluation of implementation of State Standards. Teachers also had biweekly meetings with the School Director throughout the school year in which input could be given on a 1:1 basis.

The Sherwood Community Survey was sent out on April 7, 2022 and was available through May 6, 2022. Invitations and reminders to complete the survey were included in the school announcements on April 7, April 14, April 21, and April 28. Devices with the survey pulled up were available during a well-attended community event.

On September 14, November 30, February 8, and April 5 Town Hall Meetings were held via Zoom to share information and solicit feedback from educational partners. Reminders went out in weekly school announcements in the weeks ahead of the meetings and the meetings were shown on the school's Google calendar on the homepage of the school's website. The meetings were recorded to send to all families as well as corresponding information slide presentations. Finally, the Zoom recording and slide presentations were posted on the school's homepage for potential future families to access, as well as any interested community member.

The LCAP Focus Group met on March 30, 2022 and on May 11, 2022 and looked at progress made on LCAP goals as measured by the data collected. Actions and goals were examined in light of the data and decisions regarding changes to present in the draft of the LCAP at the May meeting of the Board of Directors. At the May meeting, the draft was presented and feedback was considered for the final draft which was adopted at the Regular June meeting on June 16, 2022.

A summary of the feedback provided by specific educational partners.

Feedback from students-Students reported most satisfaction with feeling safe at school and that their teacher treated them with kindness and respect. They were most dissatisfied with the way they were treated by other students.
Feedback from parents-Parents were happy with the way the school offered opportunity to impact student outcomes and named the after school program as a program they appreciated. They were unhappy with the school's approach to discipline with PBIS, which in turn effected the perspective of respectful inclusivity as students with behavior problems were left out of celebrations for positive behavior.
Feedback from teachers and staff-Teachers and staff reported satisfaction in seeing growth students made being back in person for full days of school, but that emotional dysregulation and behavior issues kept them from maximizing teaching and learning.

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

Sherwood exceeded the planned expenditures for providing SST for academic and behavioral needs, tutoring, child care, and free and reduced lunch for reasons that can be read in the Goals Analysis sections of the LCAP for Goals 1, 3, and 4. The LCAP Highlights section also addresses how the LCAP was influenced from input from educational partners.

# Goals and Actions

## Goal

| Goal # | Description |
|---|---|
| 1 | Broad Goal: Provide an equitable learning environment with high quality, authentic Montessori instruction, curriculum aligned to Common Core State Standards, a broad range of traditional Montessori materials, highly-qualified teachers, and a facility in good repair.<br>Focus Goals:<br>1.1: Provide highly qualified teachers for all students.<br>1.2: Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS).<br>1.3: Provide a broad range of Montessori materials.<br>1.4: Provide a facility in good repair and maintain recess equipment.<br>1.5: Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. |

An explanation of why the LEA has developed this goal.

The Broad Goal here covers the State Priority 1: Basic Conditions for Learning.
A rationale for each Focus Goal is provided below:
1.1 The quality of the instruction students receive directly impacts their learning experiences and academic outcomes.
1.2 An effective curriculum increases students' understanding about the world around them and provides them with knowledge and skills necessary for success in the 21st century.
1.3 All public school students must be provided with equal access to instructional materials.
1.4 All public school students must be provided with safe and decent school facilities. Recess equipment is an important part of the school environment, as expressed by Sherwood students in the Student Survey.
1.5 Instructional strategies such as effective use of targeted direct instruction, scaffolding and modeling, monitoring student learning, and two-way feedback among students and teachers are associated with improved student achievement. The SST process addresses these and results in a plan formed with communication and analysis of data.

# Measuring and Reporting Results

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| Personnel files/teachers' credentials | 100% highly qualified credentialed teachers | 100% highly qualified credentialed teachers | | | 100% highly qualified credentialed teachers |
| CAASPP Scores | 33.4 Points Below Standard for ELA<br>90 Points Below Standard for math | TBD | | | 20 Points Below Standard for ELA<br>60 Points Below Standard for math |
| Montessori Materials Inventories | Materials are in good repair, some classrooms need replacement materials | Materials are in good repair and teachers have ordered replacement materials for those showing wear. | | | All classrooms have a broad range of materials for the grade levels served. |
| Facilities Inspection Tool | Roof leaks in restroom and 1010 Cleveland classrooms; recess & PE equipment recently replenished | Roof leaks at 1010 were addressed. Restroom leaks will be addressed over the summer of 2022. Recess and PE equipment replenished. New check-out system for recess assures all students have access to quality equipment. | | | Facility in good repair; PE and recess equipment maintained |
| Local indicator/School Community Survey | 77% of results Satisfied or Very Satisfied with Support Given to Struggling Learners | 79% of respondents indicated that they were satisfied or very satisfied with the support given to struggling learners. | | | 80% Satisfied or Very Satisfied with Support Given to Struggling Learners |

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **1.1** | Provide highly qualified teachers for all students. | Highly qualified teachers will hold the appropriate credentials for their assignments. | $1,500.00 | No |
| **1.2** | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | Sherwood will implement Montessori instruction aligned with state board adopted academic content and performance standards for all students. | $26,980.00 | No |
| **1.3** | Provide a broad range of Montessori materials. | All students in the school will have sufficient access to the standards-aligned instructional materials that are congruent with Sherwood's Montessori mission. | $4,587.00 | No |
| **1.4** | Provide a facility in good repair and maintain recess equipment. | It is a basic service for a school to provide a facility in good repair. Input from students indicate that they value playground equipment. | $14,700.00 | No |
| **1.5** | Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. | SST includes teacher, parents, and administrator. Team meets every 6-8 weeks to review data and student progress after the initial meeting to form a plan of support. Plan includes interventions chosen to support a student's academic or behavioral needs as indicated by data which may be in the form of formative assessments in the case of academic need, or referrals in the case of behavioral needs. | $130,963.00 | No |

# Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

1.2: Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS): Teachers selected essential standards from ELA and math for alignment to assessment and report cards. The work, conducted in grade-alike teams, took significantly more time than anticipated. This work will be ongoing, as formative assessment and instruction alignment are still in progress, as is the revision of report cards.

1.3: Provide a broad range of Montessori materials: Less spending this past year than anticipated as many materials had not been used for several months during school closure.

1.4: Provide a facility in good repair and maintain recess equipment: A great deal more spending in this area as the campus had deferred maintenance and landscaping during closure. Gardens were revived, playground and PE equipment was replenished, and all of these were utilized during the Extended Day program as well. Custodial costs increased to keep classrooms sanitary during the pandemic.

1.5: Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues: This was the action that saw the greatest increase in expenditures. Once students returned to in-person instruction, it took little time to see that their social-emotional needs were greater than anticipated as well as the setbacks in academic learning. Our halftime Director of MTSS became full-time, accounting for a great deal of the increased expenditure. We contracted services from two different behaviorists and invested in our counseling program, opening a wellness room for students to meet with the counselor and to use the space to reset when the counselor wasn't available. An additional aide was hired to be available in the Learning Center for when students were struggling to regulate emotionally. SST and IEP meetings were needed more frequently than anticipated. Overall, this area saw the greatest increase in expenditures from planned to actual by far.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Sherwood spent $96,650 more than originally planned, most of this was to respond to the social-emotional and academic needs displayed by the students upon return to in-person instruction.

An explanation of how effective the specific actions were in making progress toward the goal.

Broad Goal: Provide an equitable learning environment with high quality, authentic Montessori instruction, curriculum aligned to Common Core State Standards, a broad range of traditional Montessori materials, highly-qualified teachers, and a facility in good repair.

Focus Goals:

1.1: Provide highly qualified teachers for all students: Goal was accomplished.

1.2: Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS): This is an ongoing goal. Teachers provided Montessori instruction aligned to CCSS that resulted in growth for students as seen in formative assessment data. Gains were greatest in mathematics and early literacy skills.

1.3: Provide a broad range of Montessori materials: Students were eager to use materials they had been away from during distance learning, as noted in classroom observations and in student survey data for students in grades 1-3, for whom the materials are foundational (transitional kindergarten and kindergarten students are not surveyed). Among the 1st-3rd grade students, 95% indicated that they agreed with the statement "I get to do interesting activities at school."

1.4: Provide a facility in good repair and maintain recess equipment: Maintenance of the campus buildings in an ongoing goal. The 2021-2022 school year saw an increased need for facilities repair as some maintenance had not been addressed during distance learning. More maintenance work, specifically to the restrooms, will be conducted over the summer months.

1.5: Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues: A great deal of work and additional expenditures went toward addressing this action. In spite of social-emotional needs being expressed at unprecedented levels, students were cared for and the suspension/expulsion rate remained the same. Alternatives to suspension, such as restorative conferences, were used to address discipline issues that might otherwise lead to suspension. Early in the school year, a reading instructor was hired to implement Montessori Reading Pathways, a reading program that addresses early literacy needs with Montessori methods and materials. The program was originally intended to be implemented by classroom teachers, but it soon became apparent that this would be too much for teachers to take on in addition to responding to the academic needs in other areas of the curriculum while also maintaining emotionally safe classroom environments.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

Sherwood's LCAP plan for the coming year will be largely based on the experiences of the 2021-2022 school year and lessons learned. The increase in expenditures related to addressing behavioral and academic needs will be maintained, although a restructuring of these funds is planned. Rather than using resources to hire another full-time administrator for the MTSS program, the School Director will take on administrative duties. More support for emotional needs will be maintained with interns from CSU, Chico BSW and MSW programs. Services from behaviorists will also be planned for, as well as the addition of a behavioral health counselor on campus.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

| Goal # | Description |
|---|---|
| **2** | Provide a positive school climate with authentic opportunities for parent involvement.<br>2.1 Ensure that parents understand the ways the school communicates with students' families.<br>2.2 Ensure that parents understand the nature of the Montessori method of education.<br>2.3 Improve parent involvement and volunteerism.<br>2.4 Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. |

An explanation of why the LEA has developed this goal.

These goals are ongoing, maintenance goals. They were originally developed to address the following State Priorities: State Priorities: Priority 3: Parental Involvement (Engagement), Priority 5: Pupil Engagement (Engagement), Priority 6: School Climate (Engagement)

## Measuring and Reporting Results

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| Local metric/Parent Square | 100% parents contactable | 100% parents contactable | | | 100% parents contactable |
| Local metric/Community Survey Results | 78% Satisfied or Very Satisfied with Opportunities the School has Extended to Learn about the Montessori Approach to Education | 91% of respondents satisfied or very satisfied with satisfaction in terms of: curriculum, in terms of Montessori authenticity.<br>of respondents satisfied or very satisfied with satisfaction in terms of: opportunity by the school to make an impact in academic | | | 80% Satisfied or Very Satisfied with Opportunities the School has Extended to Learn about the Montessori Approach to Education and/or satisfaction in terms of: opportunity by the school to make an impact in academic outcomes for my student/s. |

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| | | outcomes for my student/s. | | | |
| Local metric/Parent Volunteer Tracking System | 20% of parents met or exceeded 50 volunteer hours per year | 23% of families reported volunteer hours; 3% of families met or exceeded 50 volunteer hours per year | | | 30% of families report volunteer hours. 10% of families meet or exceed 30 volunteer hours per year. |
| Chronic absenteeism rate | 14.44% Chronic Absenteeism Rate | Chronic Absenteeism Rate during a pandemic is not good data. | | | 10% Chronic Absenteeism Rate |
| Chronic absenteeism rate: Subgroup Hispanic | 25% Hispanic Chronically Absent | Chronic Absenteeism Rate during a pandemic is not good data. | | | 10% Hispanic Chronically Absent |
| Decreased or maintained suspension rate | 2.8% suspension rate | 2.797% suspension rate | | | 2.8% suspension rate or lower |

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **2.1** | Ensure that parents understand the ways the school communicates with students' families. | All parents will be enrolled in Parent Square with current contact information and preferences indicated for email, text or both as well as a current phone number with which to receive robocalls from the school. | $4,600.00 | No |
| **2.2** | Ensure that parents understand the nature of the | Parents will have opportunities to learn about Montessori education. | $4,650.00 | No |

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| | Montessori method of education. | | | |
| **2.3** | Improve parent involvement and volunteerism. | The school will provide opportunities for parents to become involved in their children's education and volunteer for the school. | $2,800.00 | No |
| **2.4** | Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | The school will promote regular attendance through the PBIS program and through outreach efforts to educate families on the importance of regular attendance. | $3,000.00 | No |
| **2.5** | | | | |

# Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

In 2019-2020 when the chronic absenteeism rate for Hispanic students was 25%, the plan was made to launch the Bilingual Scholars Program to share with the families of Latinx students how their kids could earn a State Seal of Biliteracy when they graduated high school, and how this achievement was linked to regular attendance. Parent events were difficult to plan for this year as the COVID virus was still very active in the community and health restrictions made gathering difficult. If the chronic absenteeism rate for Hispanic/Latinx students remains high once the pandemic is past the point of impacting attendance, this program can be considered again. With such a small school and small population of Hispanic/Latinx students, this may not be the case in the upcoming year. Likewise, some of our Parent Education events had to be reimagined since gathering in groups wasn't feasible for much of the year. Opportunities for parents to volunteer was also impacted, although volunteering did pick up as spring approached.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Expenditures were not as high as planned as events went online or were not held. Also, it was not feasible to incentivize regular attendance when much of the absences were due to illness and safety measures would require that students with symptoms stay home.

An explanation of how effective the specific actions were in making progress toward the goal.

Goals were met in terms of making progress towards more parent volunteering, keeping in contact with parents, keeping the suspension rate low, and providing parents opportunity to learn about the Montessori method of education. Absenteeism rates during a pandemic are not good data, so no conclusion about effectiveness of progress toward reducing chronic absenteeism can be made. A new question was added to the Community Survey this year to get feedback on how the school supports parents' involvement in making an impact on academic outcomes for students. 91% of parents were satisfied or very satisfied with the opportunity the school provided for parents to make an impact in academic outcomes for students.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

We will continue actions that have shown good outcomes, and hope to have more opportunity to return to some of the events that we held before the pandemic. The need for the Bilingual Scholars Program will be reevaluated as attendance data becomes more stable and the pandemic is not a factor in absences.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

| Goal # | Description |
|---|---|
| **3** | Socioeconomically disadvantaged students will have access to free or reduced lunch, free after school tutoring, and free child care before and after school. |

An explanation of why the LEA has developed this goal.

Actions associated with this goal are in response to metrics from the state Dashboard showing lower scores for students from lower income backgrounds in CAASPP testing.

## Measuring and Reporting Results

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| CAASPP scores | ELA 63 points below standard<br>Math 124.3 points below standard | TBD | | | ELA 40 points below standard<br>Math 90 points below standard |

## Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks. | Students will have access to free breakfast and lunch through Chico Unified Nutrition Services and Sherwood will provide healthy snacks. | $7,100.00 | Yes |
| **3.2** | Socioeconomically disadvantaged | Students will have access to free tutoring after school as described in our Extended Learning Plan. | $28,825.00 | Yes |

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| | students will have access to free after school tutoring. | | | |
| **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Students from lower income backgrounds will have access to free child care and a summer program. | $28,825.00 | Yes |

# Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

With additional funds from the state to support our extended day tutoring program, we will continue to offer this program to families who need it free of charge. Survey results indicate that the program is very appreciated, and the summer program has a waitlist. In addition to using CAASPP scores, which are not currently available, we will look at Student Growth Reports from Star Renaissance ELA and math assessments to see how students from low-income backgrounds who also attend the tutoring program are doing in terms of academic growth. The goal to provide free and reduced lunch was expanded to include healthy snacks as students were hungry between breakfast and lunch.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Sherwood spent significantly more on the child care and tutoring program as the state was supporting the efforts with funding. The new Extended Day Coordinator has six years experience in the Montessori classroom and is able to train the tutors to use Montessori materials and how to support learning in a way supported by the Montessori method. There was also increased spending on the goal to provide free and reduced lunch as it became apparent that healthy snacks were also needed.

An explanation of how effective the specific actions were in making progress toward the goal.

Survey results and the wait list for the summer program indicate high levels of satisfaction from parents and guardians. Impact on the CAASPP scores of students from low income backgrounds is TBD, and the Student Growth Reports from formative data will be analyzed later in the summer.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

The programs will be continued at the actual expenditures funding level as they are needed and appreciated by the students and parents.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Goals and Actions

## Goal

| Goal # | Description |
|---|---|
| **4** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. |

An explanation of why the LEA has developed this goal.

This goal is ongoing/a maintenance goal based on feedback from the community indicating appreciation for financial support for all students to attend all field trips.

## Measuring and Reporting Results

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for 2023–24 |
|---|---|---|---|---|---|
| Local measures/Community Survey Results & Student Surveys | The majority of students agree or strongly agree that they are happy to be students at the school. Teachers give feedback about the importance of field trips and inclusion of all students. | 89% of students agree or strongly agree that they are happy to be students at the school. Teachers report that including all students in filed trips is essential. | | | The majority of students will agree or strongly agree that they are happy to be students at the school. Teachers will give feedback about the importance of field trips and inclusion of all students. |

## Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **4.1** | Socioeconomically disadvantaged students will have access to | All student fees will be covered by the school for families that can't afford to contribute, including end of year middle school overnight trips to Ashland/Shakespeare Festival or Environmental Camp. | $4,000.00 | Yes |

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| | scholarships to attend field trips. | | | |

# Goal Analysis [2021-22]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

There were fewer field trips than planned because the pandemic was more active in the community than we had hoped until the spring.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The end of the year field trip for the middle school expense was less than what had originally been planned because the middle school class size was smaller, and the students ran some very successful fundraisers as part of a math and practical life unit on entrepreneurship. Overall, there were fewer field trips taken by all the grades, as stated previously.

An explanation of how effective the specific actions were in making progress toward the goal.

The field trips that did happen were enjoyed by the students, and were effective in making progress toward the goal of students reporting that they are happy to attend Sherwood.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

The goal will remain the same as it was effective in reaching desired outcomes. Although expenditures were low for the 2021-2022, the budget will remain the same as we anticipate more field trips in the coming year.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2022-23]

| Projected LCFF Supplemental and/or Concentration Grants | Projected Additional LCFF Concentration Grant (15 percent) |
|---|---|
| 118,614 | N/A |

**Required Percentage to Increase or Improve Services for the LCAP Year**

| Projected Percentage to Increase or Improve Services for the Coming School Year | LCFF Carryover — Percentage | LCFF Carryover — Dollar | Total Percentage to Increase or Improve Services for the Coming School Year |
|---|---|---|---|
| 12.34% | 0.00% | $0.00 | 12.34% |

**The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.**

## Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

After assessing the needs, conditions, and circumstances of our low-income students, we learned that the CAASPP scores in math of our low-income students are 32% lower than the CAASPP math scores for all students. In ELA, the CAASPP scores of our low-income students are 61.4% lower than all students.

In order to address this condition of our low-income students, we will provide an equitable learning environment with high quality, authentic Montessori instruction, curriculum aligned to Common Core State Standards, a broad range of traditional Montessori materials, highly-qualified teachers, a facility in good repair, and a refined Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues.

These actions are being provided on an LEA-wide basis and we expect/hope that all students below standards in CAASPP scores rate will benefit. However, because of the significantly lower scores of low-income students, and because the actions meet needs most associated

with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the scores for our low-income students will increase significantly more than the average rate of all other students.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

N/A

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

N/A

| **Staff-to-student ratios by type of school and concentration of unduplicated students** | Schools with a student concentration of 55 percent or less | Schools with a student concentration of greater than 55 percent |
|---|---|---|
| Staff-to-student ratio of classified staff providing direct services to students | N/A | N/A |
| Staff-to-student ratio of certificated staff providing direct services to students | N/A | N/A |

## 2022-23 Total Expenditures Table

| Totals | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds | Total Personnel | Total Non-personnel |
|---|---|---|---|---|---|---|---|
| Totals | $96,527.00 | $147,723.00 | | $18,280.00 | $262,530.00 | $218,899.00 | $43,631.00 |

| Goal | Action # | Action Title | Student Group(s) | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds |
|---|---|---|---|---|---|---|---|---|
| 1 | 1.1 | Provide highly qualified teachers for all students. | All<br>Students with Disabilities | $1,500.00 | | | | $1,500.00 |
| 1 | 1.2 | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | All | $12,635.00 | $10,300.00 | | $4,045.00 | $26,980.00 |
| 1 | 1.3 | Provide a broad range of Montessori materials. | All | $4,587.00 | | | | $4,587.00 |
| 1 | 1.4 | Provide a facility in good repair and maintain recess equipment. | All | $9,455.00 | $5,245.00 | | | $14,700.00 |
| 1 | 1.5 | Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. | All<br>Students with Disabilities | $48,200.00 | $68,528.00 | | $14,235.00 | $130,963.00 |
| 2 | 2.1 | Ensure that parents understand the ways the school communicates with students' families. | All | $4,600.00 | | | | $4,600.00 |

| Goal | Action # | Action Title | Student Group(s) | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds |
|---|---|---|---|---|---|---|---|---|
| 2 | 2.2 | Ensure that parents understand the nature of the Montessori method of education. | All | $4,650.00 | | | | $4,650.00 |
| 2 | 2.3 | Improve parent involvement and volunteerism. | All | $2,800.00 | | | | $2,800.00 |
| 2 | 2.4 | Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | All | $3,000.00 | | | | $3,000.00 |
| 2 | 2.5 | | | | | | | |
| 3 | 3.1 | Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks. | Low Income | $1,100.00 | $6,000.00 | | | $7,100.00 |
| 3 | 3.2 | Socioeconomically disadvantaged students will have access to free after school tutoring. | Low Income | | $28,825.00 | | | $28,825.00 |
| 3 | 3.3 | Socioeconomically disadvantaged students will have access to free child care before and after school. | Low Income | | $28,825.00 | | | $28,825.00 |
| 4 | 4.1 | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Low Income | $4,000.00 | | | | $4,000.00 |

## 2022-23 Contributing Actions Table

| 1. Projected LCFF Base Grant | 2. Projected LCFF Supplemental and/or Concentration Grants | 3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1) | LCFF Carryover — Percentage (Percentage from Prior Year) | Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %) | 4. Total Planned Contributing Expenditures (LCFF Funds) | 5. Total Planned Percentage of Improved Services (%) | Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5) | Totals by Type | Total LCFF Funds |
|---|---|---|---|---|---|---|---|---|---|
| 961,263 | 118,614 | 12.34% | 0.00% | 12.34% | $5,100.00 | 12.00% | 12.53 % | **Total:** | $5,100.00 |
| | | | | | | | | **LEA-wide Total:** | $5,100.00 |
| | | | | | | | | **Limited Total:** | $0.00 |
| | | | | | | | | **Schoolwide Total:** | $0.00 |

| Goal | Action # | Action Title | Contributing to Increased or Improved Services? | Scope | Unduplicated Student Group(s) | Location | Planned Expenditures for Contributing Actions (LCFF Funds) | Planned Percentage of Improved Services (%) |
|---|---|---|---|---|---|---|---|---|
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks. | Yes | LEA-wide | Low Income | | $1,100.00 | 3% |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | LEA-wide | Low Income | | | 3% |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | LEA-wide | Low Income | | | 3% |
| **4** | **4.1** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | LEA-wide | Low Income | | $4,000.00 | 3% |

## 2021-22 Annual Update Table

| Totals | Last Year's Total Planned Expenditures (Total Funds) | Total Estimated Expenditures (Total Funds) |
|---|---|---|
| **Totals** | $145,310.00 | $253,180.00 |

| Last Year's Goal # | Last Year's Action # | Prior Action/Service Title | Contributed to Increased or Improved Services? | Last Year's Planned Expenditures (Total Funds) | Estimated Actual Expenditures (Input Total Funds) |
|---|---|---|---|---|---|
| **1** | **1.1** | Provide highly qualified teachers for all students. | No | $1,500.00 | $1,500.00 |
| **1** | **1.2** | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | No | $16,680.00 | $26,980 |
| **1** | **1.3** | Provide a broad range of Montessori materials. | No | $8,000.00 | $4,587 |
| **1** | **1.4** | Provide a facility in good repair and maintain recess equipment. | No | $7,700.00 | $14,700 |
| **1** | **1.5** | Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. | No | $48,200.00 | $130,963 |
| **2** | **2.1** | Ensure that parents understand the ways the school communicates with students' families. | No | $4,600.00 | $4,600.00 |
| **2** | **2.2** | Ensure that parents understand the nature of the Montessori method of education. | No | $4,650.00 | $350.00 |
| **2** | **2.3** | Improve parent involvement and volunteerism. | No | $2,800.00 | $950.00 |

| Last Year's Goal # | Last Year's Action # | Prior Action/Service Title | Contributed to Increased or Improved Services? | Last Year's Planned Expenditures (Total Funds) | Estimated Actual Expenditures (Input Total Funds) |
|---|---|---|---|---|---|
| **2** | **2.4** | Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | No | $15,600.00 | $2,500.00 |
| **2** | **2.5** | Launch Sherwood Montessori Bilingual Scholars program. | Yes | $6,000.00 | $0 |
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch. | Yes | $1,100.00 | $7,100.00 |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | $12,240.00 | $28,825.00 |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | $12,240.00 | $28,825.00 |
| **4** | **4.1** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | $4,000.00 | $1,300 |

## 2021-22 Contributing Actions Annual Update Table

| 6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount) | 4. Total Planned Contributing Expenditures (LCFF Funds) | 7. Total Estimated Expenditures for Contributing Actions (LCFF Funds) | Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4) | 5. Total Planned Percentage of Improved Services (%) | 8. Total Estimated Percentage of Improved Services (%) | Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8) |
|---|---|---|---|---|---|---|
| $101,932 | $35,580.00 | $66,050.00 | ($30,470.00) | 12.00% | 12.00% | 0.00% |

| Last Year's Goal # | Last Year's Action # | Prior Action/Service Title | Contributing to Increased or Improved Services? | Last Year's Planned Expenditures for Contributing Actions (LCFF Funds) | Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds) | Planned Percentage of Improved Services | Estimated Actual Percentage of Improved Services (Input Percentage) |
|---|---|---|---|---|---|---|---|
| **2** | **2.5** | Launch Sherwood Montessori Bilingual Scholars program. | Yes | $6,000.00 | $0.00 | 1% | 0% |
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch. | Yes | $1,100.00 | $7,100.00 | 3% | 3% |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | $12,240.00 | $28,825.00 | 3% | 3% |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | $12,240.00 | $28,825.00 | 3% | 3% |
| **4** | **4.1** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | $4,000.00 | $1,300 | 2% | 3% |

## 2021-22 LCFF Carryover Table

| 9. Estimated Actual LCFF Base Grant (Input Dollar Amount) | 6. Estimated Actual LCFF Supplemental and/or Concentration Grants | LCFF Carryover — Percentage (Percentage from Prior Year) | 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %) | 7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds) | 8. Total Estimated Actual Percentage of Improved Services (%) | 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8) | 12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9) | 13. LCFF Carryover — Percentage (12 divided by 9) |
|---|---|---|---|---|---|---|---|---|
| 856,135 | $101,932 | 0.00% | 11.91% | $66,050.00 | 12.00% | 19.71% | $0.00 | 0.00% |

# Instructions

Plan Summary

Engaging Educational Partners

Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

*For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.*

# Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [*EC*] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (*EC* Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (*EC* Section 52064[b][4-6]).

    - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).

    - Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

# Plan Summary

## Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

## Requirements and Instructions

***General Information*** – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

***Reflections: Successes*** – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

***Reflections: Identified Need*** – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the "Red" or "Orange" performance category or any local indicator where the LEA received a "Not Met" or "Not Met for Two or More Years" rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the "all student*"* performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

***LCAP Highlights*** – Identify and briefly summarize the key features of this year's LCAP.

***Comprehensive Support and Improvement*** – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified**: Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools**: Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness**: Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

# Engaging Educational Partners

# Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: https://www.cde.ca.gov/re/lc/.

# Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

**Local Control and Accountability Plan:**
For county offices of education and school districts only, verify the LEA:

a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.

b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.

d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.

e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

**Prompt 1**: "A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP."

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

**Prompt 2**: "A summary of the feedback provided by specific educational partners."

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

**Prompt 3**: "A description of the aspects of the LCAP that were influenced by specific input from educational partners."

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, "aspects" of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

# Goals and Actions

## Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

## Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.

- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.

- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

**Focus Goal(s)**
**Goal Description:** The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

**Broad Goal**
**Goal Description:** Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

**Explanation of why the LEA has developed this goal:** Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

**Maintenance of Progress Goal**
**Goal Description:** Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

**Explanation of why the LEA has developed this goal**: Explain how the actions will sustain the progress exemplified by the related metrics.

**Required Goals**
In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

**Consistently low-performing student group(s) criteria:** An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA's eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

**Low-performing school(s) criteria:** The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.

- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

**Measuring and Reporting Results:**
For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric**: Indicate how progress is being measured using a metric.
- **Baseline**: Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome**: When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome**: When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome**: When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24**: When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the "**Measuring and Reporting Results**" part of the Goal.

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Year 3 Outcome | Desired Outcome for Year 3 (2023–24) |
|---|---|---|---|---|---|
| Enter information in this box when completing the LCAP for **2021–22**. | Enter information in this box when completing the LCAP for **2021–22**. | Enter information in this box when completing the LCAP for **2022–23**. Leave blank until then. | Enter information in this box when completing the LCAP for **2023–24**. Leave blank until then. | Enter information in this box when completing the LCAP for **2024–25**. Leave blank until then. | Enter information in this box when completing the LCAP for **2021–22** or when adding a new metric. |

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

***Actions***: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

***Actions for English Learners:*** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.

***Actions for Foster Youth***: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

## Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

## Requirements and Instructions

***Projected LCFF Supplemental and/or Concentration Grants***: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

***Projected Additional LCFF Concentration Grant (15 percent):*** Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

***Projected Percentage to Increase or Improve Services for the Coming School Year*:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

***LCFF Carryover — Percentage:*** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

***LCFF Carryover — Dollar:*** Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

***Total Percentage to Increase or Improve Services for the Coming School Year:*** Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

***Required Descriptions:***

**For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.**

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 *CCR* Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

**Principally Directed and Effective:** An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

> After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])
>
> In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])
>
> These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

**COEs and Charter Schools**: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

## For School Districts Only:

### Actions Provided on an LEA-Wide Basis:

***Unduplicated Percentage > 55 percent:*** For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

***Unduplicated Percentage < 55 percent:*** For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

### Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

**For schools with 40 percent or more enrollment of unduplicated pupils:** Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

**For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils:** Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

**A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.**

Consistent with the requirements of 5 *CCR* Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

**A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.**

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

# Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

# Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.
- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #**: Enter the LCAP Goal number for the action.
- **Action #**: Enter the action's number as indicated in the LCAP Goal.
- **Action Title**: Provide a title of the action.
- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span**: Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

# Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

# Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

# Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.

- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).

    - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

# LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

# Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

**Contributing Actions Table**

- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
    - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
    - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

**Contributing Actions Annual Update Table**

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
    - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
    - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
    - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
    - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
    - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
    - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

## LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
    - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
    - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
    - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

      The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
    - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
January 2022

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Local Indicators Priority 3**

**Date:** June 16, 2022

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**SUMMARY**

This year, LEAs are required to "report the Local Indicator results to the local governing board or body of the LEA at the same public meeting at which the LEA's LCAP is adopted".

**DISCUSSION**

From the instructions published by the CDE regarding Priority 3 Local Indicators required reporting:

> ● *Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.*
> ● *To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.*

*Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified*.

**ACTION REQUESTED**

Receive report

Attachment: Priority 3 Self-Reflection Tool

## *Priority 3 Self-Reflection Tool*

### Section 1: Building Relationships Between School Staff and Families

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

1 – Exploration and Research

2 – Beginning Development

3 – Initial Implementation

4 – Full Implementation

5 – Full Implementation and Sustainability

| Practices | Rating Scale Number |
|---|---|
| 1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families. | 3 |
| 2. Rate the LEA's progress in creating welcoming environments for all families in the community. | 3 |
| 3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children. | 4 |
| 4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families. | 4 |

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

Sherwood has high satisfaction ratings from the community survey for "School climate in terms of respectfulness and inclusivity", "School climate/overall satisfaction" and "Opportunity provided by the school to make an impact in

academic outcomes for my student/s". Sherwood has a bilingual/biliterate Office Manager available for Spanish speaking families and students.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

   Focus will be to improve relationships with families with students who have behavioral challenges. Although the satisfaction rate for respectfulness and inclusivity is still good: 79% satisfied or very satisfied, this fell from 94% in the prior year. Narrative themes of data collected suggest that it is the school's implementation of PBIS for students struggling with emotional regulation and behavioral challenges who are neuralatypical that account for the decrease in satisfaction. During the 2020-2021 school year, these students were in distance learning and were not in practice for social situations that are challenging during in-person learning.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

   A focus team has been identified and will be supported by resources from NorCal Educational Leadership Consortium of the 21st Century California School Leadership Academy to engage with this problem of practice and refine our implementation of PBIS to be more responsive to neuroatypical/neurodiverse students.

## Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

1 – Exploration and Research

2 – Beginning Development

3 – Initial Implementation

4 – Full Implementation

5 – Full Implementation and Sustainability

| Practices | Rating Scale Number |
|---|---|
| 5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families. | 3 |
| 6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home. | 4 |
| 7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes. | 3 |
| 8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students. | 3 |

**Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

   91% of parents report being satisfied or very satisfied with the opportunity the school provides to make an impact in academic outcomes for my student/s. Strengths include communication between classroom teachers and families, including twice yearly Parent/Teacher conferences that occur in the fall and spring before report cards are sent home in winter and at the end of the year. Students who are identified for needing more support, academically or behaviorally, may be addressed in SST (team meeting every 6-8 weeks to review data and progress towards collectively set goals) or in IEP meetings which are at least annual, but may be called more frequently.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

   Sherwood will refine our implementation of PBIS to be more responsive to neuralatypical/neuraldiverse students. Social-emotional wellness will be supported by hiring a behavioral health counselor and paid BSW/MSW interns to support the counseling program, currently staffed by a part-time MSW counselor.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

Sherwood will continue to use its SST and IEP programs to engage families to engage families. Sherwood will also continue its Anti-Bias Anti-Racist work and promote these efforts with descriptions of this work in its Family Handbooks and School Announcements, as well as promotional materials for Parent Education events.

## Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

1 – Exploration and Research

2 – Beginning Development

3 – Initial Implementation

4 – Full Implementation

5 – Full Implementation and Sustainability

| Practices | Rating Scale Number |
|---|---|
| 9. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making. | 4 |
| 10. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making. | 4 |

| Practices | Rating Scale Number |
|---|---|
| 11. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community. | 4 |
| 12. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels. | 3 |

**Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

   Sherwood Montessori has an established foundational principle of meaningful educational partner engagement. These efforts were refined and improved through the Local Control and Accountability Plan (LCAP) development process. Sherwood uses Community Surveys, LCAP Focus Group work, discussion at open public meetings, parent/teacher conferences, SMPO (parent organization) and Town Hall meetings to get input for decision-making.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Seeking Input for Decision-Making.

   We would like to have higher response rates on our Community Surveys. The LCAP Focus Group proposed the survey be delivered at the conclusion of parent teacher conferences for those who haven't yet responded. An earlier launch for the survey or for part of the survey is another proposed strategy.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

   Sherwood monitors contacts with our Parent Square app which delivers communications via text, email, and robocalls. The app is able to use Google translate to deliver messages in languages other than English. Office staff and teachers will continue to work closely to ensure that all families are contactable. Moving forward, as parents are now able to be physically on campus again, the school is beginning to use flyers, posters, and other physical reminders of events and opportunities the school extends to its community.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Declaration of Need/Statement of Need**

**Date:** June 16, 2022

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**SUMMARY**

Our County Office of Education is urging all LEAs to prepare for the potential need for emergency credentials.

**DISCUSSION**

Although Sherwood does not anticpate the need for emergency credentials, we have been notified by BCOE that all LEAs in the County are being prompted to prepare for the possibility. From the Credentials Analyst at the County Office:

*I strongly suggest that every district declare the need for at least one Emergency CLAD on page 2 and at least one Limited Assignment permit.*
*Should a staffing emergency occur during the year, you will want to place a teacher in the classroom as quickly as possible.*

**ACTION REQUESTED**

Approve application documents.

Attachments: Statement of Need, Declaration of Need

State of California
Commission on Teacher Credentialing
Certification Division
1900 Capitol Avenue
Sacramento, CA 95811-4213

*Email:* credentials@ctc.ca.gov
*Website:* www.ctc.ca.gov

# DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS

Original Declaration of Need for year: 2022-2023

Revised Declaration of Need for year: _____

**FOR SERVICE IN A SCHOOL DISTRICT OR DISTRICT/COUNTY AUTHORIZED CHARTER SCHOOL**

Name of District or Charter: Sherwood Montessori  District CDS Code: 04614240121475

Name of County: Butte  County CDS Code: 04100410000000

By submitting this annual declaration, the district is certifying the following:

- A diligent search, as defined below, to recruit a fully prepared teacher for the assignment(s) was made
- If a suitable fully prepared teacher is not available to the school district, the district will make a reasonable effort to recruit based on the priority stated below

The governing board/body of the school district or charter school specified above adopted a declaration at a regularly scheduled public meeting held on 6/19/2022 certifying that there is an insufficient number of certificated persons who meet the district's specified employment criteria for the position(s) listed on the attached form. The attached form was part of the agenda, and the declaration did NOT appear as part of a consent calendar.

▶ ***Enclose a copy of the board agenda item***

With my signature below, I verify that the item was acted upon favorably by the board. The declaration shall remain in force until June 30, 2023.

Submitted by (Superintendent, Board Secretary, or Designee):

| Michelle Yezbick | | Director |
|---|---|---|
| *Name* | *Signature* | *Title* |
| 530-345-6620 | 530-345-6600 | 6/19/2022 |
| *Fax Number* | *Telephone Number* | *Date* |

1010 Cleveland Ave., Chico CA, 95928
*Mailing Address*

michelle@sherwoodmontessori.org
*EMail Address*

**FOR SERVICE IN A COUNTY OFFICE OF EDUCATION, STATE AGENCY, CHARTER SCHOOL OR NONPUBLIC SCHOOL AGENCY**

Name of County _____  County CDS Code _____

Name of State Agency _____

Name of NPS/NPA _____  County of Location _____

The Superintendent of the County Office of Education or the Director of the State Agency or the Director of the NPS/NPA specified above adopted a declaration on ____/____/____, at least 72 hours following his or her public announcement that such a declaration would be made, certifying that there is an insufficient number of certificated persons who meet the county's, agency's or school's specified employment criteria for the position(s) listed on the attached form.

The declaration shall remain in force until June 30, _____.

▶ ***Enclose a copy of the public announcement***

Submitted by Superintendent, Director, or Designee:

| _____ | _____ | _____ |
|---|---|---|
| *Name* | *Signature* | *Title* |
| _____ | _____ | _____ |
| *Fax Number* | *Telephone Number* | *Date* |

_____

*Mailing Address*

_____

*EMail Address*

▶ *This declaration must be on file with the Commission on Teacher Credentialing before any emergency permits will be issued for service with the employing agency*

**AREAS OF ANTICIPATED NEED FOR FULLY QUALIFIED EDUCATORS**

Based on the previous year's actual needs and projections of enrollment, please indicate the number of emergency permits the employing agency estimates it will need in each of the identified areas during the valid period of this Declaration of Need for Fully Qualified Educators. This declaration shall be valid only for the type(s) and subjects(s) identified below.

This declaration must be revised by the employing agency when the total number of emergency permits applied for exceeds the estimate by ten percent. Board approval is required for a revision.

| **Type of Emergency Permit** | **Estimated Number Needed** |
|---|---|
| CLAD/English Learner Authorization (applicant already holds teaching credential) | 1 |
| Bilingual Authorization (applicant already holds teaching credential) | |
| List target language(s) for bilingual authorization: _____ | |
| Resource Specialist | 1 |
| Teacher Librarian Services | |

**LIMITED ASSIGNMENT PERMITS**

Limited Assignment Permits may only be issued to applicants holding a valid California teaching credential based on a baccalaureate degree and a professional preparation program including student teaching.

Based on the previous year's actual needs and projections of enrollment, please indicate the number of Limited Assignment Permits the employing agency estimates it will need in the following areas. Additionally, for the Single Subject Limited Assignment Permits estimated, please include the authorization(s) which will be requested:

| TYPE OF LIMITED ASSIGNMENT PERMIT | ESTIMATED NUMBER NEEDED |
|---|---|
| Multiple Subject | |
| Single Subject | 1 |
| Special Education | 1 |
| TOTAL | 2 |

| AUTHORIZATION(S) FOR SINGLE SUBJECT LIMITED ASSIGNMENT PERMITS (A separate page may be used if needed) | ESTIMATED NUMBER NEEDED |
|---|---|
| Physical Education | 1 |
| | |
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| | |

**EFFORTS TO RECRUIT CERTIFIED PERSONNEL**

The employing agency declares that it has implemented in policy and practices a process for conducting a diligent search that includes, but is not limited to, distributing job announcements, contacting college and university placement centers, advertising in local newspapers, exploring incentives included in the Teaching as a Priority Block Grant (refer to **www.cde.ca.gov** for details), participating in state and regional recruitment centers and participating in job fairs in California.

If a suitable fully prepared teacher is not available to the school district, the district made reasonable efforts to recruit an individual for the assignment, in the following order:

- A candidate who qualifies and agrees to participate in an approved internship program in the region of the school district
- An individual who is scheduled to complete initial preparation requirements within six months

**EFFORTS TO CERTIFY, ASSIGN, AND DEVELOP FULLY QUALIFIED PERSONNEL**

Has your agency established a District Intern program? ☐ Yes ☑ No

If no, explain. Single site charter school

Does your agency participate in a Commission-approved college or university internship program? ☑ Yes ☐ No

If yes, how many interns do you expect to have this year? 1

If yes, list each college or university with which you participate in an internship program.

California State University, Chico

If no, explain why you do not participate in an internship program.

State of California
Commission on Teacher Credentialing
Certification Division
1900 Capitol Avenue
Sacramento, CA 95811-4213

*Email:* credentials@ctc.ca.gov
*Website:* www.ctc.ca.gov

# ANNUAL STATEMENT OF NEED
# 30-DAY SUBSTITUTE and DESIGNATED SUBJECTS CAREER TECHNICAL EDUCATION 30-DAY SUBSTITUTE TEACHING PERMITS

## INSTRUCTIONS TO THE EMPLOYER

This statement of need must be filed at the school district office each school year when employing holders of Emergency 30-Day Substitute Permits. The employing agency will complete a single statement of need form (below) and retain the form at the school district office.

The form must be completed annually, indicating that either no credentialed person is available or that those available are not deemed qualified for substitute teaching and details of the circumstances that necessitate the use of emergency permit holders rather than fully credentialed teachers.

This statement of need form does not require listing specific employees or their positions. The form must be signed by the superintendent of the employing school district. It does not need to be co-signed by the county superintendent of schools.

A copy of the form does not need to be submitted to the county or the Commission with each Emergency 30-Day Substitute Teaching Permit application; however, the county superintendent of schools, whose responsibilities include areas such as district payroll or district substitute placement, may request a copy of the district's statement of need form to accurately fulfill these duties.

County superintendent of schools offices employing holders of the Emergency 30-Day Substitute Teaching Permit are also required to annually file, at their office, this completed statement of need form. The county superintendent of schools will sign the form.

The Commission does not require that the school board approve the statement of need. The individual school district may establish its own policy regarding this matter.

*References: California Education Code, Sections 44225 and 44300 and California Code of Regulations, Title 5, Sections 80023, 80025 and 80026*

**This form must be signed by either:**

☑ The district superintendent of schools and filed at the school district office if the holder of any Emergency 30-Day Substitute Teaching Permit will be employed as a substitute in a public school operated by a school district.

**OR**

☐ The county superintendent of schools and filed at the county superintendent of schools' office if the holder of any Emergency 30-Day Substitute Teaching Permit will be employed as a substitute in a county-operated school.

## Certification and Authorized Signature

The district superintendent of schools or the county superintendent of schools has reviewed the information contained in this statement of need and certifies one the following:

☑ Either a credentialed person is not available or one or more credentialed persons are available, but are not deemed qualified by the district or county, as applicable, to serve as a day-to-day substitute teacher.

**OR**

☐ The situation or circumstances that necessitate the use of an emergency permit holder are as follows: (Attach additional sheets, if necessary.)

I hereby certify that all of the information contained in this statement of need is true and correct.

| | Sherwood Montessori | 06/17/2022 |
|---|---|---|
| *Signature of the District Superintendent* | *District* | *Date* |
| *Signature of the County Superintendent of Schools* | *County* | *Date* |

*It is not necessary to submit this form to the Commission on Teacher Credentialing.*