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
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Passcode: 150836

Date/Time: **Thursday, August 18, 2022 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00)

A.1 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley

B. CONSENT AGENDA (6:05)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, June 16, 2022.

B.2 Employee Handbook Approval Consider approval of the 2022-2023 Employee Handbook.

B.3 MOU with Chico Country Day School Consider approval of a contract for School Nursing services with Chico Country Day School for the 2022-2023 school year.

B.4 MOU with Home Tech
The Board will consider approving an MOU with Home Tech Charter for providing ELPAC assessment services.

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.

B.6 Premium Only Plan Resolution
The Board will be asked to approve the POP Resolution for 2022-2023

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 (6.30)
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 Measure K Purchase Proposal (7:00)
The Board will be asked to approve a facilities project proposal that would be financed with Measure K funds.
ACTION REQUESTED: Approve proposal.

G. FUTURE AGENDA ITEMS
The Board will engage in retreat planning.
The Board will be asked to consider the Unaudited Actuals for the 2021-2022 school year.

H. ADJOURNMENT (7:15)

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SHERWOOD MONTESSORI

REGULAR MEETING MINUTES OF THE BOARD OF DIRECTORS

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Meeting ID: 524 521 7471
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Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, June 16, 2022 – 6:00 p.m.**

MINUTES

A. CALL TO ORDER

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

A.2 Commendations Outgoing directors will receive commendations.

Meeting was called to order at 6:03 PM by Russell Shapiro. Russell Shapiro, Beth Hammer, Robyn Howley and Karey Cooper were in attendance. Dan LaBar was absent. Outgoing directors Dan LaBar and Karey Cooper received 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.

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 was reviewed by Board, Karey Cooper moved to approve and Beth Hammer seconded with unanimous approval by 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.

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 SMPO report
E.2.2 School Director Report
E.2.3 Treasurer Report

SMPO report was reviewed by the Board. Michelle Yezbick presented the School Director Report, Pat Casey presented the Treasurer Report. Discussion followed.

E.3 Action Items

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.

Russell Shapiro and Pat Casey presented the budget report. Discussion followed. Beth Hammer motioned to adopt budget, Karey Cooper seconded with unanimous approval from present Board members.

E.3.2 Local Control Accountability Plan (LCAP)
A draft of the LCAP will be presented for adoption**.**
ACTION REQUESTED: Adopt LCAP.

Final LCAP presented by Michlle Yezbick. Discussion followed. Motion to approve made by Robyn Howley, seconded by Karey Cooper with all present Board members in favor.

E.3.3 Local Indicators Report
A report of Local Indicators will be presented.
ACTION REQUESTED: Receive report.

Local Indicators Report presented by Michelle Yezbick, report received by the Board concurrent with budget and LCAP adoption.

E.3.4 Declaration of Need/Statement of Need
Consider approval of Declaration of Need/Statement of Need
ACTION REQUESTED: Approve application documents.

Michelle Yezbick presented statement of need which was reviewed by the Board. Discussion followed. Karey Cooper motioned to approve, seconded by Russell Shapiro with all present Board members in favor.

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

Closed session commenced at 6:28, above item discussed in closed session

G. FUTURE AGENDA ITEMS

The Board will welcome new members.

H. ADJOURNMENT

Meeting adjourned at 6:35PM by Russell Shapiro

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SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Employee Handbook**

Date: August 18, 2022

SUMMARY

Revisions in the Employee Handbook are submitted for approval.

DISCUSSION

The following changes were made to the Employee Handbook:

Change	**Rationale**
Anti-Bias Anti-Racist section added AB 1266 section added	Inform employees about expectations for inclusivity
Job descritions changed	Director of MTSS omitted, Paraprofessional Aide job title changed, Counselors added, changes to Office Manager and Administrative Assistant to include former duties of Student Support Specialist, Title 1 Reading Instructor added, Tutor-Child Care added
Required Annual Trainings	Reinforce the importance of completing the trainings in a timely manner per our insurance carrier's policies
Physical Activity at Work	Reduce employee injury and exposure to workers' compensation claims
Confidentiality-health information added	Emphasize that health information, including who is ill, is confidential
Communication	Emphasize that teachers are point of contact for parents seeking information. Allow use of school email for community members who have difficulty with Parent Square.

Decision Making	Added enrollment/admissions statement to emphasize that as a public school we do not exclude.
Guidance and Discipline	Added language about refining PBIS practices
Purchasing and Reimbursements	Emphasized deadlines in submitting reimbursements.
Independent Studies	Notify employees of upcoming changes to laws governing IS
Hours of Work, Breaks, Overtime and Paydays	Statement of assigned breaks
Salary Schedule and Movement on the Salary Schedule	Statement of 10 month contract

ACTION REQUESTED

Approve revisions to Employee Handbook.

Attachments: Redline copy of 2022-2023 Emplyee Handbook

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SHERWOOD MONTESSORI

Employee Handbook

~~2020-2021~~

2022-2023

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Reimbursement Form
Request for Absence Form
Absences Verification Form
Thought Paper
& Sherwood Referral Form

~~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.

Anti-Bias Anti-Racist Education

Sherwood is committed to ABAR practices to provide an equal opportunity to all students and families to success. It is understandable and expected that in a diverse community, misunderstandings may arise that need to be resolved with respectful dialogue. The appropriate response of an employee when a conflict arises with a fellow employee, student, or student family member is one of concern and curiosity with an openness to learning, not defensiveness. Reported perceptions of inequity will be investigated by school leadership and involved employees will be expected to express a commitment to ABAR practices in the process.

ABAR practices also include a willingness to partner with students' families, parents, and guardians with a respect for differences in educational philosophies. Every effort should be made to understand a diverse experience and view of education with cooperation and partnership as the spirit of our work with families.

School Success and Opportunity Act: AB 1266

From the California Department of Education:
AB 1266 clarifies California's student nondiscrimination laws by specifying that all students in K-12 schools must be permitted to participate in school programs, activities, and facilities in accordance with the student's gender identity.

A transgender or gender nonconforming student may not express their gender identity openly in all contexts, including at home. Revealing a student's gender identity or expression to others may compromise the student's safety. Thus, preserving a student's privacy is of the utmost importance. The right of transgender students to keep their transgender status private is grounded in California's antidiscrimination laws as well as federal and state laws. Disclosing that a student is transgender without the student's permission may violate California's antidiscrimination law by increasing the student's vulnerability to harassment and may violate the student's right to privacy.

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 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 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.

Required Annual Trainings

All staff are required to complete online, annual trainings in a timely manner. Due dates will be assigned, and are not arbitrary, rather they are assigned by our insurance carrier. Failure to complete required assignments will result in an assigned leave of absence until the required training is complete.

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.
- Participates as the LEA administrator of the Individualized Education Program (IEP) team in the identification of individuals with exceptional needs, as appropriate.

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

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.
- Oversee student playground activities and monitor classroom during temporary absence of teacher.
- 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.
- 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.
- Check employee time sheets and have them ready for the director's review.
- Check employee time sheets and have them ready for the director's review.
- Maintain Director's calendar of daily tasks.
- Oversee progress of "Requests" written by the Director for employees and contractors.
- Maintain staff and student email addresses and passwords.
- Maintain key inventory and provide keys to employees that need them.
- Perform other tasks as requested.

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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.
- Complete California Department of Education required data submissions, such as CALPADS and attendance reports.

~~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.
- Maintains student records in the SEIS system.
- Maintains student records in the SEIS system.
- Fulfill role of Technology Coordinator for CAASPP and ELPAC.
- Maintain the school network including maintaining the Securly web filtering program.
- ~~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~~Maintain the school network including maintaining the Securly web filtering program.
- Set up new students with accounts in technology-based applications and make requested changes to student class placement in accounts.
- Set up new students with accounts in ~~iReady and other~~ technology-based applications and make requested changes to student class placement in accounts.
- Maintain calendar of school events.
- Perform other tasks as requested.
- 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

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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 tasks as requested.

Title One Reading Instructor

- Provides a variety of instructional, clerical, and group behavior assistance to individuals or small groups of students in support of special instructional programs.
- May provide other support services such as translation.
- Assists certificated staff in the preparation and use of materials to enhance the student learning experience.
- Assists with the creation and implementation of lesson plans to maximize learning experiences.
- Confers, as needed, with certificated staff concerning programs and materials to meet student needs.
- Alerts immediate supervisor to any special problems or information concerning students.
- May proctor and administer tests (e.g. phonemic awareness, reading level, spelling). Scores tests and written papers based on answer

keys or rubrics. Keeps appropriate records for teachers, including computerized grading sheets.

- Maintains records, collects data, monitors data, and presents results for student study teams, parent teacher conferences, and student records.
- Participates in relevant professional development.
- Performs clerical support duties as required including preparing and maintaining a variety of files and records.
- Occasionally will need to support with supervision of students during recess and lunch or coworkers break periods.
- Performs other duties as assigned.

Behavioral Health Counselor

- Support students with regulating their emotions/behaviors in the Learning Center
- Support and advise teachers through instructional challenges, student behavioral difficulties, and acts as a parent liaison
- Facilitate communication between school staff to support a unified support response to individual students.
- Offer emotional and/or behavioral support to students in the classroom setting.
- Support and enhance students' emotional and behavioral stability.
- Attend Individual Education Plan (IEP) meetings as necessary to review student progress and help develop goals/objectives.
- Perform other tasks as requested.

Mental Health Counselor

- Consult and cooperate with special education and general education personnel.
- Make recommendations for educationally-related mental health services for students with significant social emotional and/or behavior needs.
- Develop and maintain behavioral health programs in collaboration with the IEP team process.
- Engage diverse families in the coordination process and engage access to services.
- Make recommendations to IEP teams for educationally related mental health counseling services.
- Participate in SSTs, IEPs and other student progress meetings.
- Provide continuum of counseling interventions for students enrolled in general and special
- education.
- Provide individual and group counseling services.
- Provide technical assistance, consultation and training to schools regarding community resources
- and other mental health issues as necessary.
- Provide training for school staff regarding proactive pre-referral activities and behavioral support
- systems.
- Serve as school liaison between students and their families, and other community agencies.
- Perform other tasks as requested.

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.
- Perform other tasks as requested.

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.
- Supports student focus and concentration, minimizes interruption and distraction during work periods and lessons.
- Refrains from any activity that would cause interruption from student learning or focus on classroom teacher's lessons.

- 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.
- Perform other tasks as requested.

Instructional Aide: Support

- 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.
- Perform other tasks as requested.
- Perform other tasks as requested.

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 other tasks as requested.

Physical Activity at Work

Staff members are not allowed to play sports or physical games (i.e.: tag) with students. This is because injuries may occur and employees who are injured at work or only to covered for workers compensation for duties that are included in their job descriptions. This includes P.E. instruction and coaching/teaching physical play and athletic activities.

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. *Health information is confidential, including whether or not a student or fellow employee is ill or has been ill.*

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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.

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~~an instructional aide or ~~paraprofessional~~instructional aide: support, 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. Parent inquiries should be referred to the classroom teacher.*

- 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 workday as an employee. DO NOT approach your colleagues during the workday. 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.

Supervisor Role

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*. Currently, the Parent Square App is the preferred mode of written communication from the school, however, if a parent/guardian/family member has difficulty using the app, use of school email is permitted. Employees are not to use personal email to communicate school related business.

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 or comparable education or experience. 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

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 Star Renaissance Early Literacy data for grades K-4, Star Renaissance Reading for grades 3-8 or younger students who show preparedness through Early Literacy results, and Star Renaissance Math for grades 1-8. Fountas and Pinnell guided reading levels are determined 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 the ELPAC state assessments for English learners and the required state summative assessments for students in grades 3-8 (CAASPP or CAA 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: Star Renaissance 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, ELPAC assessment results, teacher created/chosen summative assessments

Decision Making Process

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 (note: as a public school, Sherwood does not exclude any potential student from admission when there is an opening regardless of perception of fitness for a Montessori program).
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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

8.7. Staffing assignments
~~8.~~7. Staffing assignments
9.8. Instructional Aide's schedules
10.9. Enrichment schedules (art, music, PE)
11.10. Whole school events
12.11. Fundraising
13.12. Field trips: overnight/out of state requires Board approval
14.13. Employee performance issues
15.14. 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". Major Behavior Referral Forms must include communication to the parent, either in person, or via telephone or email (if the parent

uses email). 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*.

Since our first year of implementation, the PBIS team has refined the program in an effort to align it more congruently with Montessori philosophies. In the 2022-2023 school year, members of the PBIS team will be participating in the Northern California Education Leadership Consortium with the refinement of the school's PBIS program as our problem of practice. Further changes to the implementation to align with supportive practices of Positive Discipline should be anticipated.

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.

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.*

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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.

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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. When practical, 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.

Requests for reimbursement must be submitted within 30 days of event AND by July 10 of each year. Exceptions cannot be made; this is fiscal policy and we audited for our adherence to our fiscal policy. If an

employee is concerned about their ability to process the reimbursement request in a timely manner, the employee should request that the purchase be made through office personnel rather than relying on the reimbursement procedures.

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.

- 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)
- Patrick's Ranch
- Ecological Reserve – 3rd Grade
- Country Pumpkins
- Climbing wall at CSU Chico
- Bidwell Park walks
- NorCal Reptile Adventures
- NorCal Reptile Adventures
- 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 Chinese Museum

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 Independent Study if they need to be away from school during any calendared student day. Parents are 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 the student for the duration of the Independent Study such that it is comparable to the quantity and quality 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.

During the COVID-19 pandemic, changes were made to laws related to Independent Study that required schools to make IS available immediately to students who were required to isolate or quarantine. Monitoring of student participation was detailed in the law as were reengagement procedures for students who were not participating in IS in an educationally beneficial way. These laws are likely to change again during the 2022-2023 school year, and school leadership and administrative personnel will keep instructional staff abreast of these changes as they occur.

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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 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 childcare 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~~Offer of ~~employment~~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~~Offer of ~~employment~~Employment will be considered invalid. Failure to comply with these

stipulations will result in disciplinary action and may result in termination of employment. The Offer of Employment will include assigned rest and meal breaks.

Two Part Test for Exemption for Overtime Pay
Minimum salary: Assumptions: 12 month work year, 40 hour work week $58,240/year
$4,853.34/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 will be assigned rest breaks and meal periods
- 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

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

Salary Schedule & Movement on the Salary Schedule

Teachers are considered 10 month employees generally starting in August and ending in May with 180 school days and 5 development or prep days. Arrangements can be made to divide annual pay into the two months of summer recess.

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.

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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.

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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.

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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 Administrative Assistant 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
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 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. 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.

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.

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **MOU with Chico Country Day School for School Nursing Services**

Date: August 18, 2022

SUMMARY

The Board will be asked to approve an MOU with Chico Country Day School for School Nursing Services

DISCUSSION

This MOU is the same as the one we had with CCDS last year, updated for this current school year.

ACTION REQUESTED

Approve MOU.

Attachment: MOU with Chico Country Day School for School Nursing Services

Memorandum of Understanding between
Sherwood Montessori School and Chico Country Day School

This memorandum of understanding ("MOU" or "Agreement") is between Sherwood Montessori School (Sherwood) and Chico Country Day School ("CCDS"), which are referred to as the "parties".

RECITALS:

A. Sherwood is a charter school authorized by Chico Unified School District..

B. CCDS is a charter school authorized by the Chico Unified School District.

C. Sherwood wishes to contract with CCDS for CCDS's provision of School Nursing services to Sherwood 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 Sherwood students are provided with nursing services by CCDS. It is agreed that Sherwood shall retain all financial and legal responsibilities under the Individuals with Disabilities Education Improvement Act ("IDEA") and related federal and California laws for Sherwood students served by CCDS in accordance with this MOU. Sherwood shall remain liable for all complaints, mediations, due process matters and/or other litigation initiated by or on behalf of Sherwood students which arise under such laws. CCDS shall only be considered a service provider and not the responsible LEA for any Sherwood student and shall incur no costs associated with the provision of these services, all of which shall be paid by Sherwood as set forth in this MOU. Unless the parties agree otherwise in writing, CCDS is not required to provide anything beyond what is specifically identified in this MOU.

2. Services of the school nurse may include:

(a) Assessing and evaluating student health and developmental status as part of the Individual Education Plan (IEP) or Section 504 Plan process;

(b) Communicating with students, families, caregivers, and health care providers;

(c) Interpreting assessments and medical information to school staff working with the students;

(d) Designing and implementing an Individualized School Health Plan, Emergency Care Plan, Individual Educational Plan and/or Section 504 Plan related to health care needs or chronic illnesses;

(e) Determining the appropriate level of care for students with specialized health care needs and training, monitoring and supervising licensed and unlicensed staff;

(f) Providing school nursing case management services for students;

(g) Counseling students and parents regarding health or school related issues and providing information and referral to community services;

(h) Administering and training and supervising school staff in assisting students with routine and emergency medications;

(i) Serving as a health consultant and providing inservice programs to staff on a variety of health topics;

(j) Developing curriculum and assisting in delivery of comprehensive health education to students;

(k) Promoting a healthy school environment for emotional and physical safety;

(l) Performing federal and state mandated tasks including but not limited to emergency care; child abuse reporting; communicable disease control, prevention and follow up; and CHDP, audiometric, scoliosis and vision screening;

(m) Providing routine direct healthcare services and referrals;

(n) Maintaining, protecting and managing confidential electronic and written student health records.

3. Additional Sherwood Obligations

Sherwood shall:

(a) Pay CCDS for services identified herein, consistent with the Fiscal Agreement set forth in paragraph 7 below.

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

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

(d) Store confidential health files at the Sherwood site.

(e) Provide nurse with assessment plans upon signature so health and developmental history may be completed.

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 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.

5. Due Process and/or Litigation

Sherwood assumes full responsibility for the provision of assessments and therapy services to Sherwood students. It shall be the financial and legal responsibility of Sherwood 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 CCDS is named as a party to a legal dispute, Sherwood will cooperate in dismissing, with prejudice, CCDS as a party. If Sherwood is unable to obtain dismissal of CCDS as a party to a dispute, Sherwood shall fully defend and indemnify CCDS in said proceedings in accordance with the Indemnification provision in paragraph 8 below. CCDS shall fully cooperate with Sherwood in any legal dispute, including making its employees and documents available.

6. Indemnification

Sherwood shall protect, defend, indemnify, forever hold harmless and assume the costs of defense, including attorneys' fees, of CCDS, 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 County 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 CCDS's obligations under this Agreement. Sherwood shall indemnify CCDS 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.

7. Fiscal Agreement

CCDS will bill Sherwood in advance for school nursing services on a monthly basis, for 10 months, at the rate of:

- School Nurse:

  a. 0.10 FTE or equivalent of 18.5 days based on the employee's position on the CCDS Nursing Salary Schedule. Any additional days of work required by Sherwood shall be requested in writing and approved by both Sherwood and CCDS administrators. Sherwood

will be billed at the employee's daily rate, daily benefit costs plus a 2% fee based on the daily amounts.

b. Twenty percent (20%) of the benefit cost of the employee, including PERS, payroll fees and other fees associated with an employee.

- Mileage rate equal to the IRS Standard Mileage Rates, if applicable.
- Actual costs of translation services as needed and requested by Sherwood for any reports and assessments performed by CCDS staff.
- 2% Administrative Fee based upon the salary and benefit rates listed above.

Sherwood has thirty (30) days from the date of billing to issue payment to CCDS.

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 CCDS and/or Sherwood 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, 2022 and continue through June 30, 2023.

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

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

(f) 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 Sherwood School of Arts & Sciences

Date: _____ By: _____
Sherwood Director

Date: _____ By: _____
Sherwood Board Chairperson

On Behalf of Chico Country Day School

Date: 6/15/22 By: _____
CCDS Director of Student Support Services

Date: 6/15/22 By: _____
CCDS Board Chair

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **MOU with Home Tech Charter School for ELPAC Assessment Services**

Date: August 18, 2022

SUMMARY

The Board will be asked to approve an MOU with Home Tech Charter School for ELPAC Assessment Services

DISCUSSION

This MOU is the same as the one we had with Home Tech Charter School, updated for this current school year. We will provide Home Tech with assessment services should they enroll an English language learner.

ACTION REQUESTED

Approve MOU.

Attachment: MOU with Home Tech Charter School for ELPAC services

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 $75.00, 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: $76.50

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, 2022 and continue through June 30, 2023.

(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: **Consolidated Application**

Date: August 18, 2022

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

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SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **POP Resolution**

Date: August 18, 2022

SUMMARY

Approval of this resolution satisfies a legal requirement.

DISCUSSION

While we have always offered a Premium Only Plan (POP) for health coverage, we are now required by law to have the board approve a resolution stating this. POP coverage provides a reduced gross income which benefits employees by reducing their taxes.

ACTION REQUESTED

Approve resolution.

Attachment: POP Resolution

Certificate of Resolution (2022)

For Sherwood Montessori Charter School

Section 125 Premium Only Plan

Plan Year Ending August 31, 2023

The undersigned Secretary or Principal of **Sherwood Montessori Charter School** (the Employer) hereby certifies that the following resolutions were duly adopted by the board of directors of the Employer on **September 1, 2022**, and that such resolutions have not been modified or rescinded as of the date hereof:

RESOLVED, that the form of Amended Section 125 Cafeteria Plan effective **September 1, 2022**, presented to this meeting is hereby approved and adopted and that the proper officers of the Employer are hereby authorized and directed to execute and deliver to the Administrator of the Plan one or more counterparts of the Plan.

RESOLVED, that the Administrator shall be instructed to take such actions that are deemed necessary and proper in order to implement the amended Plan, and to set up adequate accounting and administrative procedures to provide benefits under the Plan.

RESOLVED, that the proper officers of the Employer shall act as soon as possible to notify the employees of the Employer of the adoption of the amended Plan by delivering to each employee a copy of the summary description of the Plan in the form of the Summary Plan Description presented to this meeting, which form is hereby approved.

The undersigned further certifies that true copies of the Adoption Agreement, Plan Document, and the Summary Plan Description, approved and adopted in the foregoing resolutions, are attached herewith.

By _____
Secretary/Principal

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SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **School Director Report**

Date: August 18, 2022

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 2022-2023 school year and some staff from last year with new assignments:

New Staff Member	Position
Adam Mankowski	TK/K Teacher
Juliette Madsen (started last year in Extended Day)	Instructional Aide in Marlo Knox's 1/2/3 class
Brian Maciel (started last year as Anne Adams' Instructional Aide)	Instructional Aide in Kim Powers' 1/2/3 class
Kevin Paz	Instructional Aide in Adam Mankowski's TK/K class
Natalie Roberson	Instructional Aide in Teresa Shippen's TK/K class
Angelina Bushnell (started last year as an Instructional Aide in the Learning Center)	Instructional Aide in Jessi Lusardi's 4/5/6 class
Amy Navarro	Child Care/Tutor

We are still seeking to hire a School Psychologist and a Behavioral Health Counselor.

- We will have two interns from the CSU, Chico Social Work Department: Emma Cuff is doing an internship for her MSW program and Sariah Pilant is doing an internship for her BSW program. Our Wellness Counselor, Laura Swanson, is working directly with the interns to coordinate services for our students to have access for support during every school day.
- The work on the student restrooms was not completed for the first day of school. The CUSD maintenance crew was expecting a quick turnaround, but once they began removing the flooring they could see that the subfloor, drywall, and shower board all needed replacing. This resulted in our students' needing to use the closest bathrooms on the Chapman side until the

work is completed. Chapman students are not using the bathrooms that are being used by our students at this time. The work should be completed this week, and they will be like new.

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

Legislative

- The legislature failed to provide charters and county offices of education with equal treatment regarding funding that addresses declining enrollment in the state budget.
- Changes were made in the Independent Study regulations designed to make the program less onerous to schools.
- All California students will have access to free lunch for an additional year.
- Children who turn 5 between September 2 and February 2 may enroll in Transitional Kindergarten this school year.

SHERWOOD MONTESSORI

To: Board of Directors

From: Pat Casey, Business Manager

Subject: **Treasurer's Report**

Date: August 18, 2022 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 July 2022 reconciled with and matched those of the school's internal reports. The Ending Balance totaled $ 579,664.29 as of July 31, 2022 for the checking account.
- The majority of expenses in July were for the ELOP grant for summer school.

Profit & Loss

- The July Profit & Loss report shows a Net Income of -$52,247, which will be offset by LCF funds deposited in August along with State Grant funds 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.

Sherwood Montessori
Profit & Loss YTD Comparison
July 2022

	Jul 22
Ordinary Income/Expense	
Income	
8000-Revenues	3,919
Total Income	3,919
Gross Profit	3,919
Expense	
1000 Certificated Salaries	7,463
2000 Classified Salaries	13,581
3000-Employee Benefits	13,976
4000-Books and Supplies	4,568
5000 Services/Other Op. Exp.	14,956
Do Not Use This One	1,623
Total Expense	56,166
Net Ordinary Income	-52,247
Net Income	**-52,247**

Sherwood Montessori
Board of Directors - Vendor Payments Report
July 2022

Type	Date	Num	Name	Memo	Account	Amount
Check	07/01/2022	DBT	Target	BIKE LOCK	Maintenance Supplies	23.58
Check	07/11/2022	DBT	Amazon.com	TV WALL MOUNT - JESSIE	Instructional Supplies	42.57
Check	07/12/2022	EFT	Comcast 4454	SERVICE - JUNE/JULY 2022	Internet Service Provi...	228.41
Check	07/12/2022	DBT	Amazon.com	FILE FOLDERS	Office Supplies	16.52
Check	07/12/2022	DBT	Safeway	SUMMER CAMP FOOD	Food (Instructional)	36.41
Check	07/12/2022	DBT	Chico Pet Works & Pet Station	MARLO - KING KRILL	Instructional Supplies	26.80
Check	07/12/2022	DBT	Growing up Chico	Business card ad	Advertising	200.00
Check	07/14/2022	DBT	HP LEASE 7603	Lease Payment - Customer ID...	HP DIRECT LEASE	316.21
Check	07/14/2022	9478	Hernandez Cleaning Service	INV 47673	Housekeeping Services	1,900.00
Check	07/14/2022	9479	CatapultK12	2022-23 Website hosting	Website, Hosting	1,188.00
Check	07/14/2022	9480	Velazquez Flying Carpet Man	Carpet cleaning - INV 681	Housekeeping Services	1,360.00
Check	07/14/2022	9481	North State Parent Magazine	INV 72421 DIRECTOR-AD	Advertising	435.00
Check	07/14/2022	9482	SchoolWise Technologies	INV 2704- TECH/WEB/REG/...	Office Supplies	3,000.00
Check	07/15/2022	DBT	Lowe's	PAINT FOR RAMPS	Maintenance Supplies	221.75
Check	07/15/2022	9468	Macquarie Equipment Capita...	Kyocera Copier Lease JULY	Copier Lease	220.94
Check	07/20/2022	EFT	Comcast Business 9110	SERVICE 2022 AUG-JUL	Internet Service Provi...	162.38
Check	07/21/2022	DBT	Costco	Snacks	Food (Instructional)	310.83
Check	07/25/2022	9487	Comcast Ethernet	JULY Service-2742	Ethernet - Fiberoptic	1,489.86
Check	07/25/2022	9488	Andrew Bays	Landscape materials - CONT...	Maintenance Supplies	433.56
Check	07/25/2022	9489	California Charter Schools A...	22/23 DUES	5300-Dues and Mem...	1,325.00
Check	07/25/2022	DBT	Amazon.com	PRIME MO FEE	Instructional Supplies	16.08
Check	07/26/2022	DBT	Target	SUPPLIES	Office Supplies	449.29
Check	07/26/2022	DBT	Amazon.com	TV STAND - JESSI	Instructional Supplies	32.71
Check	07/27/2022	EFT	Pat Casey	CONTRACT SERVICE INVOI...	Business Manager Se...	4,400.00
Check	07/27/2022	9491	Andrew Bays	Landscape hours - CONTRAC...	Contracted Service	1,449.00
Check	07/27/2022	9493	Macquarie Equipment Capita...	Kyocera Copier Lease JULY S...	Copier Lease	220.94
Check	07/28/2022	DBT	USPS	STAMPS	Postage	60.00
TOTAL						**19,565.84**

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Appointment of Board Members**

Date: August 18, 2022

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.

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Election of Officers**

Date: August 18, 2022

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.

Measure K Charter School Facilities Committee
Project Recommendation Form for Consideration by CUSD Board of Trustees

GENERAL INFORMATION:

Submission Meeting Date	August 22, 2022
Name of School	Sherwood Montessori
Address of School	1010 Cleveland Ave.
Contact Name	Michelle Yezbick
Contact Phone/Email	530-345-6600 michelle@sherwoodmontessori.org
Year Established	2010
Charter Renewal Date	January, 2017
CDS Code	04-61424-00121475
Charter Number	1166
Website	www.sherwoodmontessori.org

1. **Type of Project:**
   - _____ Planning
   - _____ Construction
   - _____ Health Safety (Including ADA)
   - _____ Modernization/Repair/Renovation/Improve
   - _____ Purchase or Lease Project
   - ___X_ Other (including FF&E)

2. **Project Narrative:**

   This proposal is to request funds to purchase furnishings and equipment for the TK/K campus and office furniture for the main campus. This proposal requests that funds for this project be allocated from Round 3 of Sherwood's bond allocation.

Item	Estimated cost
Desks for office	880
Children's outdoor environment furnishings & equipment	8515
Secure gate for TK/K campus	1,500
Teaching desk	450
	12,000

3. **Charter School Property Project Location**: *(If project location is different from address above.)*

   _____

   a. Does your school currently operate on a CUSD School Site: ___X__ yes _____ no
   b. Does your school lease property/buildings from a private owner: _____ yes ___X__ no

   Note: Sherwood also operates on a site it owns, adjacent to Chapman Elementary, at 1010 Cleveland Ave.

4. **Current enrollment and ADA: ___100_____**

5. **Financial Questions**
   a. Was your prior annual audit report free of any negative findings? ____ yes __X___ no
   (if no, please explain) Tiered Re-engagement Plan for Independent Study needed revision.

b. What were your cash reserves as a percent of expenditures at the end of the prior fiscal year?
42%

6. Project Schedule

Please briefly describe the timeline for the project planning and completion.
During the summer of 2022, our TK/K classrooms moved from the main campus to the 1010 Cleveland Ave. property. We anticipate completing the development of the outdoor space in the next 4 months. Office furniture and teaching table will be installed when they arrive, also within 4 months.

7. **Preliminary Estimate (Cost)**

Measure K Allocation	$1,402,006
Less Previously Allocated Funds	$1,007,297
Less Current Project Funds Requested	$12,000
Remaining Allocation	$382,709

School Facilities Projects to be Funded with Proceeds of Bonds

"Bond proceeds will be expended to repair, modernize, replace, renovate, expand, construct, acquire, equip, furnish and otherwise improve the classrooms and school facilities the [charter's] existing schools, new school sites, and other [charter] owned properties to provide equity among campuses, improved facilities, and student access to instructional technology."—Measure K

Documentation *(please indicate those completed)*

All Projects

Project Narrative: general scope of work	__X___ *Included*
Enrollment Capacity: Current Facility and/or Proposed	__X__ *Included*
Preliminary Estimate (Cost)	__X___ *Included*
Project Schedule	__X___ *Included*

Building/Modernization/Renovation Projects

Feasibility Study and Site Review	_____ *Included* __X_ *Not Applicable*
Enrollment Capacity: Current Facility and/or Proposed	__X___ *Included*___ *Not Applicable*
Pre-Schematics *(to be completed by a District approved architect and/or engineering team)*	_____ *Included* __X_ *Not Applicable*
Facility Assessment	_____ *Included* __X_ *Not Applicable*
Schematic Drawing(s) *(areas of work)*	_____ *Included* _X__ *Not Applicable*
CEQA Process Determination *(pre-CEQA-form)*	_____ *Included* _X__ *Not Applicable*
Design Development Drawings	_____ *Included* _X_ *Not Applicable*
Design or Bid Estimate	_____ *Included* _X__ *Not Applicable*
Construction Documents	_____ *Included* _X__ *Not Applicable*

For Committee Use:

All necessary documents were included: __X___ **yes** _____**no**
(if no: request for additional documentation)

CORE QUESTIONS:

1. Does the project fall under the bond language? yes
2. Given the life span of a bond, is the project an appropriate use of funds? yes
3. Has the school demonstrated the feasibility of project completion? yes
4. Has the local school board approved the project? yes

MEASURE K—CHARTER FACILITIES COMMITTEE APPROVAL

Date of Committee Approval: _____

Attestation of Committee Secretary: _____

For questions or clarifications relative to the completion of this application, please contact:
Kevin Bultema at kbultema@chicousd.org or (530) 891-3000 x. 112

96

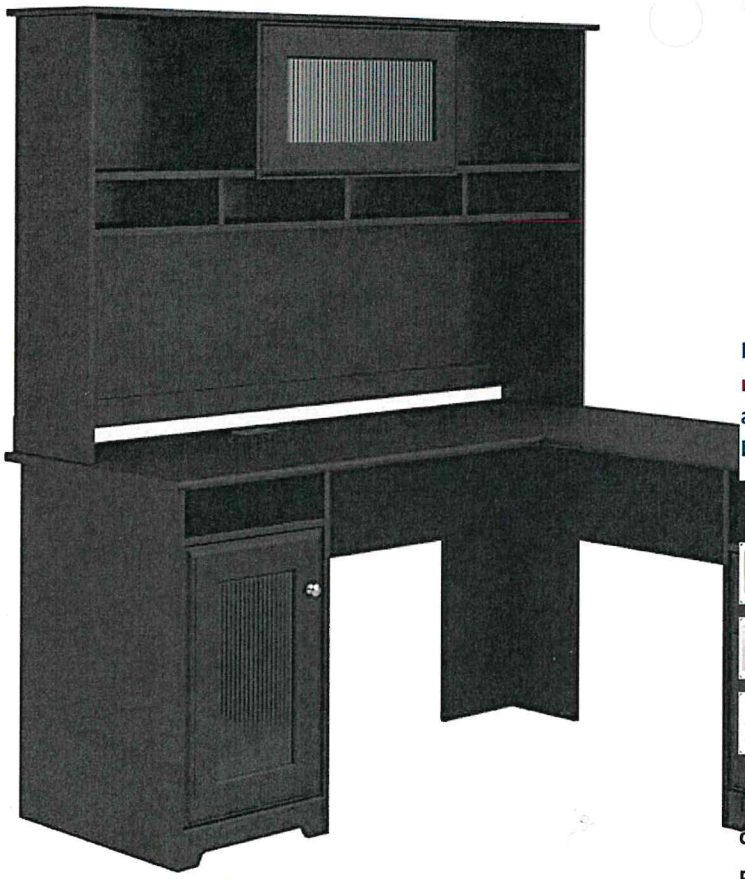
#1

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Bush Furniture Cabot L Shaped Desk with Hutch

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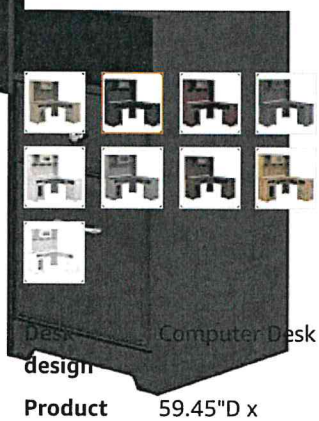
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3 VIDEOS

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Desk Computer Desk

design	
Product Dimensions	59.45"D x 59.45"W x 66.46"H
Color	Espresso Oak
Room Type	Office

See more

About this item

- Your purchase includes One Bush Furniture Cabot L-Shaped Desk with Hutch in Espresso Oak, CAB001EPO model | This bundle includes RTA CA1 60" L-Desk, 60W L Desk & Hutch
- Desk dimensions - 59" W x 59" D x 66" H | Please refer to product pictures for additional measurements

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$564.23 Add to Cart
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FLEXISPOT EW8 Comhar Electric Standing Desk with Drawers Charging USB Port, Height Adjustable 48" Whole-... $399.99 1,046

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Back to results

#2

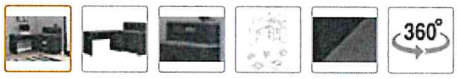
Monarch Specialties Computer Desk L-Shaped - Left or Right Set- Up - Corner Desk with Hutch 60"L (Black - Grey Top)

Visit the Monarch Specialties Store

115 ratings



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-22% $498.90

List Price: ~~$643.20~~

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Available at a lower price from other sellers that may not offer free Prime shipping.

Color: **Black - Grey Top**



$498.90 $548.99

Enhance your purchase

Products that go with this
End tables, lamps, coffee tables and

Desk design	Computer Desk
Product Dimensions	62.75"D x 47.25"W x 30.75"H
Color	Black - Grey Top
Room Type	Office
Shape	L-Shape
Special	Engineered particle board solid wood l

See more

About this item

- SPACE-SAVING DESIGN - Finished in a taupe reclaimed wood-look laminate, this extra-large computer desk with generous storage options has an L-shaped design intended for placement in a corner; it measures 62.75 inches L x 59 inches W x 44.75 inches H

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FREE delivery **Tuesday, July 26.**
Order within 5 hrs 21 mins

Select delivery location

Available to ship in 1-2 days.

Qty: 1

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New (10) from
$497.90 & **FREE Shipping**

Other Sellers on Amazon

Quote / Saved Cart

School Specialty

Created by Michelle Yezbick

Your Shopping Cart

Cart 1009033235 | Last modified on 08/16/2022

Prices are subject to change in saved carts.

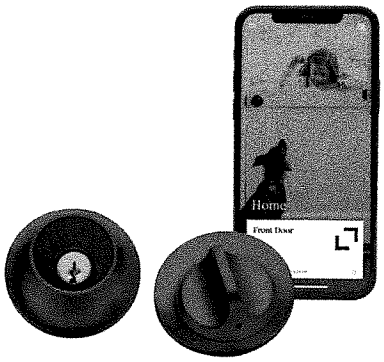
1 Item

Product	Delivery	Quantity	Unit Price	Total Price
 **Classroom Select Markerboard NeoClass Leg Activity Table, T-Mold, Half Moon, 36 x 72 Inches** Item #: 7661508 Ships Directly from Manufacturer Typically Within 2-4 Weeks - Lead Times Vary Edge Color:Titanium Leg Color:Titanium Product Height:30-43 Adj Height	*Free Shipping: ineligible*	1	$315.71	$315.71

Subtotal	**$315.71**
+ Estimated Tax: ⓘ	**$30.07**
+ Shipping: ⓘ	**$99.00**
Total	**$444.78**

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Level Lock Smart Lock with Bluetooth Keyless Entry

Item 1617616

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Features:

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- Lock and Unlock with Siri
- Run Automations and More with Homekit
- Easy to Install with Just a Screwdriver

Finish : Matte Black

Matte Black | Nickel

Delivery

Estimated Delivery Date if ordered now: **Thursday, August 18**
Delivery ZIP Code: **95968**
Change

1

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Same-Day Delivery

This item is currently not available for Same-Day Delivery.

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Product Details | Specifications | Shipping & Returns | Reviews

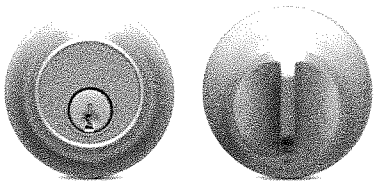
Product Details

Product details have been supplied by the manufacturer and are hosted by a third party.

Meet Level Lock

level Lock

Our Smallest Smart Lock Ever.

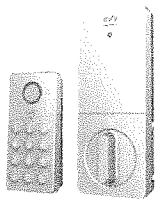


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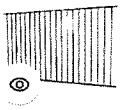
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Some of your items are low in stock! View All

Pickup at Yuba City Lowe's

6 Items



Monroe 5-ft H x 8-ft W Black Steel Decorative Fence Panel

Item #94419 Model #58281340

Save For Later | Remove

1 + $138.00

Store Pickup
Available
FREE

Ship to Home
Unavailable

Truck Delivery
Get it by Wed, Aug 24
Schedule your delivery during checkout



Black Metal Fence Mounting Bracket For Decorative Metal Fence 4-Pack

Item #99167 Model #58200802

Save For Later | Remove

1 + $18.43

Store Pickup

Start Secure Checkout

Feedback

Chat

Ship to Home
Get it by Thu, Aug 25

Truck Delivery
Get it by Wed, Aug 24
Schedule your delivery during checkout

HURRY! LOW IN STOCK



1-1/2-in Steel-painted Gate Swivel Bracket

Item #419193 Model #58200764

Save For Later | Remove

— 2 + $23.96

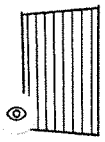
$11.98/ea

Store Pickup FREE
Available

Ship to Home
Get it by Thu, Aug 25

Truck Delivery
Get it by Wed, Aug 24
Schedule your delivery during checkout

HURRY! LOW IN STOCK



5-ft H x 4-ft W Powder Coated Vinyl-coated Steel Flat-top Walk-thru Decorative Fence Gate

Item #94960 Model #58270633

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— 1 + $136.00

Store Pickup FREE
Available

Ship to Home
Unavailable

Truck Delivery
Get it by Wed, Aug 24
Schedule your delivery during checkout



BRINKS COMMERCIAL

32-in Aluminum Universal Reversible Rim Exit Device

Start Secure Checkout

Feedback

Chat

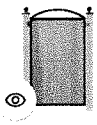
— 1 + $158.00

Store Pickup FREE
Available

Ship to Home
Get it by Thu, Aug 25

Truck Delivery
Get it by Wed, Aug 24
Schedule your delivery during checkout

Ship to Home . 1 Item



Nuvo Iron
Black Gate Frame Kit
Item #5055122 Model #PRO8-ESP
Save For Later | Remove

— 1 + $209.99

Store Pickup FREE
Get it by Tue, Aug 23

Ship to Home FREE
Get it by Tue, Aug 23 (est.)

Truck Delivery
Get it by Wed, Aug 24
Schedule your delivery during checkout

Truck Delivery . 8 Items



5/8-in x 5-1/2-in x 5-ft Redwood Flat-top Fence Picket
Item #1505795 Model #20880-05
Save For Later | Remove

— 8 + $27.84
$3.48/ea

Start Secure Checkout

Feedback

Chat

Store Pickup
Unavailable

Ship to Home
Unavailable

Truck Delivery **$90.00**
Get it by Wed, Aug 24
Schedule your delivery during checkout

Your order qualifies for Free Standard Shipping!

$45

Switch Now, Save Later
Pick up this order, get a coupon for up to $5 off your future purchase of $20 or more. **Exclusions apply >**

+ **Switch Now**

Order Summary

Item Subtotal (15)	**$712.22**
Special Fees	**$0.28**
Estimated Delivery	**$90.00**
Shipping	**FR**
Estimated Tax	Calculated in Check
Add Promo Code	
Estimated Total	**$802.50**

Feedback

Back to Top

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Order Status

Lowe's Credit Cards

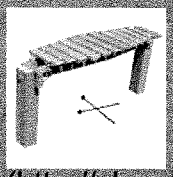
Gift Cards

Start Secure Checkout

Chat

Proceed to Checkout

Shopping Cart (1 Product, 1 Item)



4273 (http://shop.natureexplore.org/Akambira/Akambira-Short_5.html)
$1,695.00

(http://shop.natureexplore.org/Akambira/Akambira-Short_5.html)

Quantity
1

Amount: $1,695.00

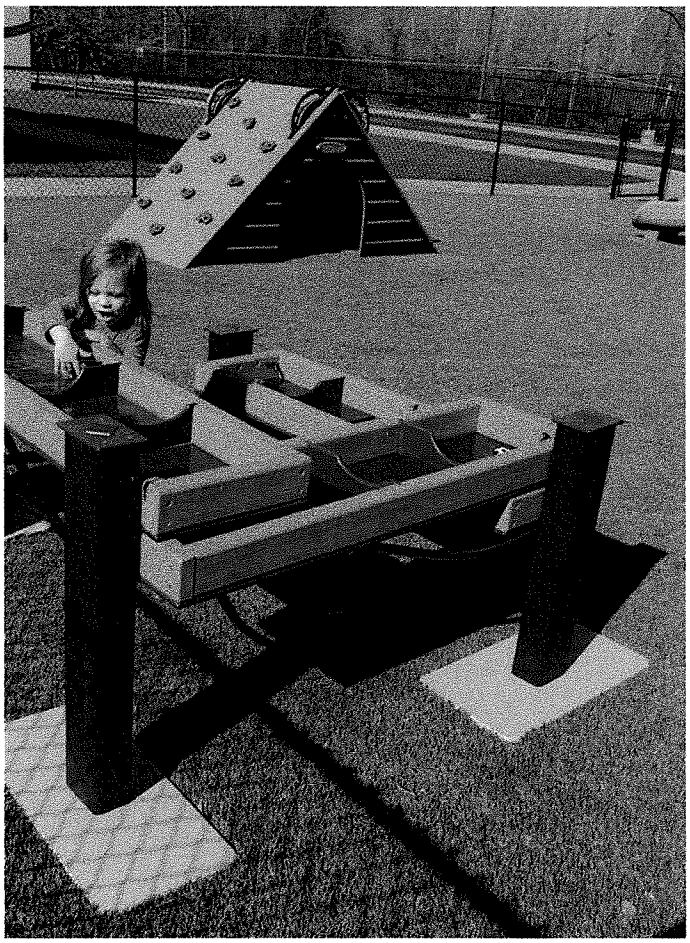
Remove

Order Summary

Subtotal (1 item)	**$1,695.00**
Ship to: 95928	
Shipping	$254.25
Tax	$0.00
Estimated Total	**$1,949.25**

Proceed to Checkout

Continue Shopping ()



$2,862.00

Be the first to review this product

- Size: 84" L. x 66" W. x 56" H. with pump in "U" co
  Troughs are 42" 36" & 30"
- Weight: 288 lbs
- Ages 2 to 5 years
- Mounts in-ground

Qty 1 ADD TO QUOTE

Add to Wishlist

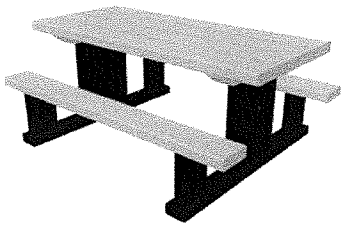
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public or private, in the design stage or ready for pricing, our team of specialists would be happy t
l 800-448-2972 or email at playground@constructiveplaythings.com for assistance.
pment Ships F.O.B. factory, by Truck. Allow 4 to 6 weeks for delivery

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Schoolyard Children's Picnic Table (48" L x 20" H)

by Sprogs® | SKU: SPG-TANSA-XNPT-PIC-04A ☆☆☆☆☆ | Q & A (2) | Start a Live Chat



$702.88
MSRP: ~~$1,405.76~~
You Save: $702.88 (50%)

Select Options:

1) Select Table Height: 20" H ▼

2) Choose a picnic table color com... ⊕

4 **Add to Cart**

95928 **Calculate Shipping**

Shipping Estimate*

Estimated Shipping Cost: $892.11
Product Cost: $2,811.52
Estimated Total Cost: $3,703.63

*Why is this cost estimated? Shipping & handling costs on many larger items depend on variables such as whether you have a loading dock and whether you need help getting your merchandise off the truck.

Call or chat for product availability or to discuss alternate items.

Or purchase now and we'll reserve this item for you.

On Sale

Produ

- Perfec
- Const stainle
- Availa

Description | Specs

Product Weight (Lbs)	137
Recommended Ages	2 - 5 years
Assembly	Assembled
Height	20" H
Length	48" L
Material	Post Material: Recycled Structural Plastic Stainless Steel hardware
Warranty	10-year limited
Shipping Method:	Freight

See less

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Similar Items | **Recently Viewed**



Learniture
Horseshoe Whiteboard Activity Table
★★★★★ (5.0)
$419.88

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)

Date/Time: **Thursday, September 15, 2022 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00)

A.1 Roll Call Russell Shapiro, Beth Hammer, Tina Hanson-Lewis, Robyn Howley, Jolynn Aanenson

B. CONSENT AGENDA (6:05)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, August 18, 2022.

B.2 Contract Approval Consider approval of a memorandum of understanding for school psychologist services with Blue Oak.

B.3 Unaudited Actuals Accept the Business Manager's Unaudited Actuals Report.

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 (6:15)

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.3 Action/Discussion Items (6:45)

E.4 Board Governance (7:10)

E.4.1 Remarks from the Chair

E.4.2 Discussion of Governance
ACTION REQUESTED: Discuss board governance.

E.4.3 Committees
The Board will be asked to appoint Directors to the required committees.
ACTION REQUESTED: Appoint committee members.

F. FUTURE AGENDA ITEMS

The Board will be asked to approve a Prop 39 Facilities Request for the 2023-2024 school year.
The Board will be asked to approve a school calendar for the 2023-2024 school year.

G. CLOSED SESSION (7:30)

G.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.

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

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 18, 2022 – 6:00 p.m.**

MINUTES

A. CALL TO ORDER

A.1 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley

Russell Shapiro called meeting to order at 6:07 PM, Beth Hammer and Robyn Howley In attendance.

B. CONSENT AGENDA

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, June 16, 2022.

B.2 Employee Handbook Approval Consider approval of the 2022-2023 Employee Handbook.

B.3 MOU with Chico Country Day School Consider approval of a contract for School Nursing services with Chico Country Day School for the 2022-2023 school year.

B.4 MOU with Home Tech The Board will consider approving an MOU with Home Tech Charter for providing ELPAC assessment services.

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.

B.6 Premium Only Plan Resolution The Board will be asked to approve the POP Resolution for 2022-2023

Russell Shapiro reviewed Consent Agenda, discussion followed. Robyn Howley motioned for approval, Beth Hammer seconded with all in favor.

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 School Director Report

E.2.2 Treasurer Report

Michelle Yezbick presented School Director Report, Pat Casey presented Treasurer Report. Discussion Followed

E.3 Action/Discussion Items

E.3.1 Appointment of Directors

The Board will consider appointing directors to open seats on the board.
ACTION REQUESTED: Appoint directors.

Russell Shapiro introduced new Board of Director candidates Tina Hanson-Lewis and Jolynn Aanenson. New members elected with unanimous approval.

E.3.2 Election of Officers

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

Russell Shapiro discussed Board officer positions. The following officers were elected with unanimous approval:

Chair: Russell Shapiro
Vice Chair: Tina Hanson-Lewis
Treasurer: Beth Hammer
Secretary: Robyn Howley

E.3.3 Measure K Purchase Proposal

The Board will be asked to approve a facilities project proposal that would be financed with Measure K funds.
ACTION REQUESTED: Approve proposal.

Michelle Yezbick presented Measure K Purchase Proposal, discussion followed. Robyn Howley motioned for approval, Beth Hammer seconded with all in favor.
.

G. FUTURE AGENDA ITEMS

The Board will engage in retreat planning.
The Board will be asked to consider the Unaudited Actuals for the 2021-2022 school year.

H. ADJOURNMENT

Russell Shapiro adjourned meeting at 6:46 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: **MOU with Blue Oak for School Psychologist Services**

Date: September 15, 2022

SUMMARY

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

DISCUSSION

This MOU is similar to the one we had last year with Blue Oak for the same services. This year's agreement is for 40% of full-time equivalency for Blue Oak with another 40% full-time equivalency for Sherwood. Last year's MOU was 60% Blue Oak and 40% Sherwood.

ACTION REQUESTED

Approve MOU.

Attachment: 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 0.4 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.

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.

(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 at the rate of:

- School Psychology:

  a. 0.4 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 3% fee based on the daily amounts.

  b. Sixty percent (40%) 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 August 1, 2022 and continue until a permanent replacement is found.

(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.

(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

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **School Director Report**

Date: September 15, 2022

Administrative

- Updated enrollment will be reported at the meeting.
- Our transitional kindergarten/kindergarten campus is continuing to develop with the installation of a shade pergola and an outdoor painting station. There has been a delay with the shipment of the playset that will be installed once it arrives. The bathroom remodel was completed in August and they are much improved!
- Rotations on Tuesday and Wednesday afternoons has all students receiving special instruction from a teacher other than their own. 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, independent contractors, and interns to date follows. We are still seeking a permanent school psychologist.

Employees, Interns, and Independent Contractors

Office/Administration

Director	Michelle Yezbick
Administrative Assistant	Heather Fisher
Office Manager	Vanessa Aripez
Business Manager	Pat Casey

Special Education

Education Specialist	Happy Yasko
School Psychologist	Jolynn Aanenson
Speech and Language Pathologist	Anna Meehan
School Nurse	Natalie Wren
Occupational Therapist	Jen Moreno
Instructional Aide	Danielle Moncrief
Instructional Aide: Support	Marta Taylor
Behavioral Health Counselor	Elizabeth Rodriguez

General Education

TK/Kindergarten Teacher	Teresa Shippen
TK/Kindergarten Aide	Natalie Roberson
TK/Kindergarten Teacher	Adam Mankoski
TK/Kindergarten Aide	Kevin Paz
1st/2nd/3rd Teacher	Kim Powers
1st/2nd/3rd Aide	Sara Skeeters
1st/2nd/3rd Teacher	Anne Adams
1st/2nd/3rd Teacher	Marlo Knox
1st/2nd/3rd Aide	Juliette Madsen
4th/5th/6th Teacher	April Pearce
4th/5th/6th Aide	Dellanira Carillo
4th/5th/6th Teacher	Jessi Lusardi
4th/5th/6th Aide	Angelina Bushnell
7th/8th Teacher	Michael Whittemore
Classified Staff Lead	Brenda Brown
Playground Supervision Lead	Brenda Brown

Specialists

Physical Education	Kimberly Fellner
Wellness Counselor	Laura Swanson
Title 1 Reading Instructor	Maribel De La Cerda
MSW Intern	Emma Cuff
BSW Intern	Sariah Pliant
Custodians	Hernandez Cleaners
Maintenance & Landscaping	Andrew Bays

Extended Day-Child Care

Coordinator	Brenda Brown
Aide	Nora Horvath
Aide	Amy Navarro
Aide	Shawna Dorn
Aide	Briana Valdez
Aide	Sarah Kane

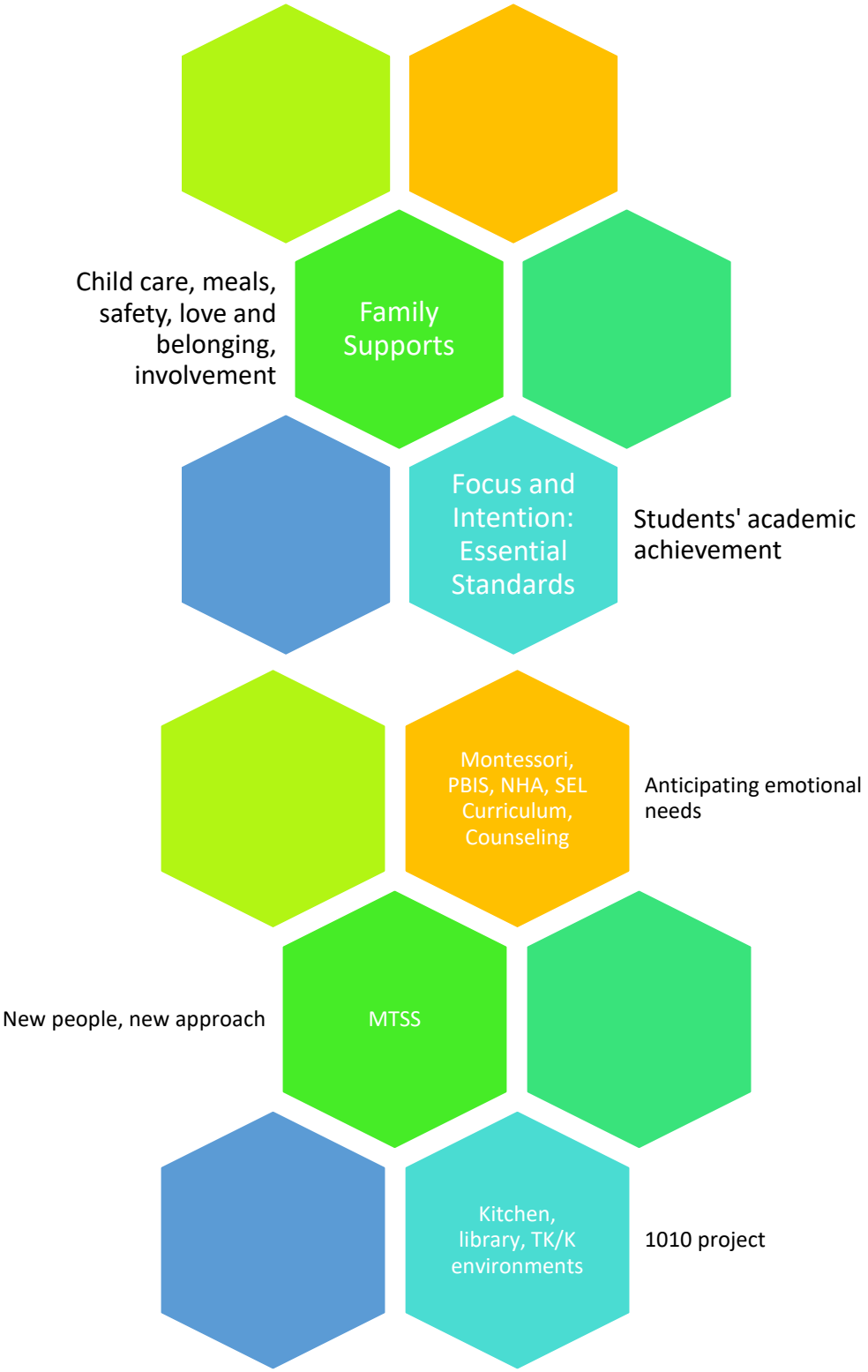
Safety

- We have been having indoor after lunch recess on days with excessive heat. Classes are able to have outdoor exercise in the morning by using the 20th Street Park or the time designated for Sherwood kindergarten recess, which is 10:45-11:15.

Legislative

- AB 1343 (Leyva D), a bill that would have required charter schools to participate in public employees' retirement programs was stopped when it was not moved forward from "reconsideration".

2022-2023 Sherwood Montessori School Initiatives



SHERWOOD MONTESSORI

To: Board of Directors

From: Pat Casey, Business Manager

Subject: **Treasurer's Report**

Date: September 15, 2022

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 2022 reconciled with and matched those of the school's internal reports. The Ending Balance totaled $ 579,664.29 as of August 31, 2022 for the checking account.
- The expenses in August were for the opening of school.

Profit & Loss

- The August Profit & Loss report shows a Net Income of -$79,657, which will offset by LCF funds deposited in September along with any State Grant funds.

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.

Sherwood Montessori
Board of Directors - Vendor Payments Report
August 2022

Type	Date	Num	Name	Memo	Account	Amount
Check	08/01/2022	7357	Yasko, Harry P	REFUND STRS - JULY ACCO...	3101-STRS, Certificated	70.97
Check	08/02/2022	DBT	1 & 1 Internet Inc.	Internet hosting- 3MO. 2022 J...	Website, Hosting	45.00
Check	08/02/2022	DBT	Indeed	Ad for job position	Advertising	343.82
Check	08/04/2022	9497	Andrew Bays	Landscape hours - CONTRAC...	Contracted Service	561.00
Check	08/04/2022	EFT	Comcast 4454	SERVICE - JULY/AUG 2022	Internet Service Provider	228.95
Check	08/04/2022	EFT	California Water Service ...	JULY SERVICE	Water	51.41
Check	08/04/2022	DBT	WAYFAIR.COM	SANDBOX	Instructional Supplies	144.78
Check	08/05/2022	DBT	ZOOM	ZOOM MEETINGS 2022	ONLINE MEETING PR...	157.40
Check	08/08/2022	DBT	Facebook Ads	AD - RM	Advertising	7.64
Check	08/09/2022	DBT	Amazon.com	SUPPLIES	Instructional Supplies	14.97
Check	08/09/2022	DBT	Amazon.com	SUPPLIES	Instructional Supplies	75.05
Check	08/09/2022	DBT	Amazon.com	HEPA FILTER C	Instructional Supplies	128.69
Check	08/10/2022	9503	Comcast Ethernet	Service-2742 2022 AUGUST	Ethernet - Fiberoptic	1,494.41
Check	08/10/2022	9507	Macquarie Equipment Ca...	Kyocera Copier Lease JUNE S...	Copier Lease	18.54
Check	08/10/2022	EFT	Waste Management	SERVICE 2022 JULY	Trash/Recycling	128.68
Check	08/10/2022	9499	Advanced Document	SERVICE 2022 JULY	Copier Lease	163.32
Check	08/10/2022	9502	Chico Country Day	NATALIE WREN - NURSE -Inv...	Contracted Service	1,291.91
Check	08/10/2022	9504	Hernandez Cleaning Serv...	INV 48173	Housekeeping Services	1,600.00
Check	08/10/2022	DBT	STAPLES	SUPPLIES	Instructional Supplies	167.56
Check	08/10/2022	DBT	Costco	Snacks	Food (Instructional)	438.89
Check	08/10/2022	DBT	RUGS.COM	WOOL ROUND RUG	Instructional Supplies	456.89
Check	08/10/2022	DBT	eBay	GREEN RUG	Instructional Supplies	117.01
Check	08/11/2022	9505	Hernandez Cleaning Serv...	INV 64367	Housekeeping Services	4,880.00
Check	08/11/2022	DBT	HP LEASE 7603	Lease Payment - Customer ID ...	HP DIRECT LEASE	316.21
Check	08/11/2022	DBT	Amazon.com	LIQUID CHALK MARKERS	Office Supplies	28.95
Check	08/11/2022	DBT	Amazon.com	MURS BASE STATION	Office Supplies	142.00
Check	08/11/2022	DBT	Neacail Murdock	MOVE CLASSROOMS	Contracted Service	536.01
Check	08/12/2022	9506	Hernandez Cleaning Serv...	REIMB CLAIM - RENE HERN...	Maintenance Supplies	324.34
Check	08/12/2022	DBT	Lowe's	PAINT-SUPPLIES	Maintenance Supplies	70.66
Check	08/12/2022	DBT	Amazon.com	HANDHELD 2-WAY RADIO	Office Supplies	182.30
Check	08/13/2022	DBT	Amazon.com	SUPPLIES	4300-Materials and Sup...	112.65
Check	08/14/2022	DBT	Amazon.com	MAGLITE FLASHLIGHT	Instructional Supplies	18.14
Check	08/14/2022	DBT	Amazon.com	MEAD PRIMARY - PENCILS	Instructional Supplies	43.64
Check	08/14/2022	DBT	Amazon.com	SPICE RACK	4300-Materials and Sup...	21.98
Check	08/15/2022	DBT	Neacail Murdock	MOVE CLASSROOMS	Contracted Service	92.00
Check	08/15/2022	DBT	Amazon.com	PUZZLE MAP	Extended Day	69.70
Check	08/15/2022	DBT	Amazon.com	BANDAGES	Office Supplies	46.46
Check	08/15/2022	DBT	Amazon.com	SUPPLIES	Extended Day	20.35
Check	08/15/2022	DBT	Amazon.com	FILE ORGANIZER	4300-Materials and Sup...	40.72
Check	08/15/2022	DBT	Paypal	BUTTE COUNTY - LAURA S...	Contracted Service	51.32
Check	08/15/2022	NRD	IN JEDDS	NR	Instructional Supplies	25.14
Check	08/16/2022	9508	Voltage Specialist	Annual fire alarm monitoring S...	Contracted Service	350.00
Check	08/16/2022	EFT	PG & E	SERVICE 2022 JUL-AUG	Electricity	748.05
Check	08/16/2022	EFT	Laura Swanson	TUBS-CHARGING TABLE-RUG	Instructional Supplies	129.00
Check	08/16/2022	EFT	Comcast Business 9110	SERVICE 2022 AUG-SEP	Internet Service Provider	181.55
Check	08/16/2022	EFT	Anne Adams	GUITAR-CART-TINTED FILM-...	Instructional Supplies	293.66
Check	08/16/2022	DBT	heutink USA	CRAYONS - TERESA	Instructional Supplies	137.39
Check	08/16/2022	DBT	Amazon.com	TRACFONE	Telephone, Cellular	46.45
Check	08/16/2022	DBT	Amazon.com	COMPOSITION BOOKS	4300-Materials and Sup...	53.56
Check	08/16/2022	DBT	Amazon.com	PREPAID FLIP PHONE	Telephone, Cellular	21.32
Check	08/16/2022	DBT	Office Depot	SUPPLIES	Office Supplies	151.96
Check	08/16/2022	EFT	COSTCO VISA CARD	2022 15TH PURCHASES JUL...	SHERWOOD COSTCO...	6,794.98
Check	08/17/2022	DBT	Amazon.com	BANDAGES	Office Supplies	8.57
Check	08/17/2022	DBT	Amazon.com	BALL-BEADS-PLAY SAND	Extended Day	72.78
Check	08/17/2022	DBT	Office Depot	BDR 6 PK	Office Supplies	38.17
Check	08/17/2022	DBT	Costco	Snacks	Instructional Supplies	307.26
Check	08/17/2022	DBT	BED BATH & BEYOND	FAN MIST	Office Supplies	91.11
Check	08/18/2022	9509	DOMINIQUE SILVA SOA...	BIAS TRAINING PREP AND P...	Contracted Service	350.00
Check	08/18/2022	EFT	IXL	SERVICE SITE LICENSE - 22-...	Contracted Service	1,575.00
Check	08/18/2022	ACH	CharterSAFE	P&L PREMIUM 8 - 22/23 AUG ...	5400-Liability Insurance	3,000.00
Check	08/18/2022	ACH	CharterSAFE	WC PREMIUM 8 - 22/23 AUG ...	3601-Workers Comp	748.00
Check	08/18/2022	DBT	Amazon.com	SUPPLIES	4300-Materials and Sup...	211.04
Check	08/18/2022	DBT	Amazon.com	WATERCOLOR PAPER	4300-Materials and Sup...	128.57
Check	08/18/2022	DBT	Verizon Wireless	2022 AUG	Telephone, Cellular	93.60
Check	08/18/2022	DBT	Wufoo	SERVICE AUGUST	Online List Management	19.00
Check	08/18/2022	NRD	Amazon.com	NR	Instructional Supplies	117.74
Check	08/18/2022	NRD	Amazon.com	NR	Instructional Supplies	26.84
Check	08/18/2022	NRD	Amazon.com	NR	Instructional Supplies	93.30
Check	08/18/2022	NRD	MONARCH	NR	Instructional Supplies	134.65
Check	08/19/2022	DBT	Amazon.com	PLAY-DOH	Instructional Supplies	16.08

Type	Date	Num	Name	Memo	Account	Amount
Check	08/19/2022	DBT	Amazon.com	PLAY-DOH	4300-Materials and Sup...	16.08
Check	08/19/2022	NRD	Amazon.com	NR	Instructional Supplies	51.47
Check	08/20/2022	DBT	Amazon.com	JACK BLANK COLLECTION	4300-Materials and Sup...	28.95
Check	08/22/2022	DBT	Amazon.com	BALL STORAGE	LCAP	235.94
Check	08/23/2022	DBT	Amazon.com	WATER BOTTLE STICKERS	4300-Materials and Sup...	7.50
Check	08/23/2022	DBT	USPS	MAILING	Postage	17.45
Check	08/23/2022	DBT	Office Depot	SOAP-STAPLER-SCSSRS-SU...	Office Supplies	160.54
Check	08/24/2022	DBT	Amazon.com	UMBRELLAS	4300-Materials and Sup...	43.08
Check	08/24/2022	DBT	Home Depot	BAMBOO FENCE	Maintenance Supplies	611.13
Check	08/25/2022	7359	Marta Taylor	20 hours of missed breaks at $...	5800-Other Services	390.00
Check	08/25/2022	DBT	Amazon.com	BRUSH PALLET	4300-Materials and Sup...	10.71
Check	08/25/2022	DBT	Amazon.com	PLASTIC RULERS	4300-Materials and Sup...	21.40
Check	08/25/2022	DBT	Amazon.com	STICKERS FOR KIDS	4300-Materials and Sup...	7.50
Check	08/25/2022	DBT	Johnny's Chico Lock and ...	extra keys	Facility Repairs	35.91
Check	08/25/2022	DBT	Costco	Snacks	Instructional Supplies	344.42
Check	08/25/2022	DBT	Amazon.com	WHITEBOARD 36X60	4300-Materials and Sup...	211.27
Check	08/25/2022	NRD	Home Depot	BAMBOO FENCE	Maintenance Supplies	611.13
Check	08/26/2022	9512	Andrew Bays	Landscape hours - CONTRAC...	Contracted Service	858.00
Check	08/26/2022	9513	Focal Point Landscape S...	LANDSCAPE MATERIAL - BA...	Maintenance Supplies	2,380.95
Check	08/26/2022	9511	Adam Mankoski	SUPPLIES	Instructional Supplies	332.93
Check	08/27/2022	DBT	Amazon.com	MAC SPORTS UTILITY WAG...	4300-Materials and Sup...	90.08
Check	08/28/2022	DBT	Amazon.com	MONTESSORI READING RE...	4200-Books/reference ...	268.13
Check	08/29/2022	DBT	Amazon.com	24-AA BATTERIES	Office Supplies	39.16
Check	08/30/2022	7369	Mankoski, Adam M	REFUND SS - STRS MEMBER	OASDI-Social Security	371.68
Check	08/30/2022	DBT	STAPLES	PENS-PENCILS	Office Supplies	85.74
Check	08/30/2022	DBT	The Creative Apple	RED/BLUE PAPER	Instructional Supplies	21.92
Check	08/30/2022	DBT	USPS	mailing	Postage	9.45
Check	08/31/2022	7370	Adam Mankoski	REPLACEMENT CHECK - PR ...	1100-Teacher Salaries	3,270.30
Check	08/31/2022	DBT	Amazon.com	STITCH STICKERS	4300-Materials and Sup...	6.41
Check	08/31/2022	DBT	TEA BAR CAFE	Meal - UE Meeting	Food - Meetings	97.25
Check	08/31/2022	EFT	Laura Swanson	SUPPLIES	Counseling	56.11
Check	08/31/2022	9516	Steve Duke	keys	Maintenance Supplies	50.87
Check	08/31/2022	9517	JOLYNN AANENSON	LIVESCAN	LiveScan and TB Test S...	64.00
Check	08/31/2022	9518	SARAH SKEETERS	LIVESCAN	LiveScan and TB Test S...	64.00
Check	08/31/2022	9519	Kellie Sutterfield	Monthly pesticide service (Gre...	Pest Control	85.00
Check	08/31/2022	9515	Wilgus Fire Control, Inc.	FIRE EXTINGUSHER CHK	Contracted Service	211.00
Check	08/31/2022	9521	AMY NAVARRO	LIVESCAN	LiveScan and TB Test S...	64.00
Check	08/31/2022	EFT	Teresa Shippen	SUPPLIES	Instructional Supplies	59.65
Check	08/31/2022	EFT	Teresa Shippen	SUPPLIES	4300-Materials and Sup...	18.31
Check	08/31/2022	EFT	Teresa Shippen	SUPPLIES	4300-Materials and Sup...	300.66
Check	08/31/2022	EFT	Teresa Shippen	SUPPLIES	4300-Materials and Sup...	13.13
Check	08/31/2022	EFT	Teresa Shippen	SUPPLIES	4300-Materials and Sup...	294.81
Check	08/31/2022	EFT	California Water Service ...	SERVICE 2022 JUL-AUG	Water	49.17
Check	08/31/2022	EFT	Pat Casey	CONTRACT SERVICE 2022 A...	Business Manager Servi...	4,400.00
Check	08/31/2022	NRD	Amazon.com	NR	Instructional Supplies	83.62
TOTAL						**47,119.90**

Sherwood Montessori
Profit & Loss YTD Comparison
August 2022

	Aug 22
Ordinary Income/Expense	
Income	
8000-Revenues	64,284
Total Income	64,284
Gross Profit	64,284
Expense	
1000 Certificated Salaries	62,573
2000 Classified Salaries	24,205
3000-Employee Benefits	26,004
4000-Books and Supplies	11,137
5000 Services/Other Op. Exp.	20,023
Total Expense	143,941
Net Ordinary Income	-79,657
Net Income	**-79,657**

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Board Governance: Committees**

Date: September 15, 2022

The Board is asked to appoint members to the required committees and suggested committees for the 2022-2023 school year. The Board may choose to create standing committees and/or ad hoc committees in addition to the following required committees.

A recommendation for an ad hoc committee to appoint for the 2022-2023 school year would be a committee to evaluate the school in terms of inclusivity and anti-bias practices and policies.

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. ● 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)* ● BYLAWS, SECTION 2. SELECTION: The Board of Directors will be selected in the following way: 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); 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; 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 June meeting.

<u>Finance Committee</u> (Required, Ad Hoc) *includes Audit Committee and Budget Committee*	
Members:	Committee has included in the past: School Director, Teacher Representative, Administrative Assistant(audit), Business Manager as Consultant, Board member *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 ● 20.1 Procedure for the Development of the Annual Budget ● 20.2 Reporting of Annual Budget and Interim Reports ● 20.3 Legal Compliance of Budget **Charter makes no direct reference to an "Audit Committee" but states that the BOD will facilitate the audit.* 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. ● 9.1 Fiscal Year & Reporting Deadlines ● 9.2 Contracting and Overseeing the Independent Audit ● 9.3 Qualifications of the Auditor ● 9.4 Scope of the Financial Audit ● 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) 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. 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** 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. 6.1 Safety Plan, 6.2 Additional Health Policies, 6.3 Safe Building Policies

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)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, October 20, 2022 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

B. CONSENT AGENDA (6:05 p.m.)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, September 15, 2022.

B.2 Approval of Prop 39 Facilities Request Consider approval of Prop 39 Request for Facilities.

B.3 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 School Director Report

E.2.2 Treasurer Report

E.3 Action Items (6:40)

E.3.1 Suicide Prevention Policy

State law requires that a Board of Education periodically review and update their Suicide Prevention Policy.

ACTION REQUESTED: Approve policy.

E.3.2 Signers on Bank Account (6:50)

The school needs updated signers on its bank account.

ACTION REQUESTED: Approve resolution to change bank account signers.

E.4 Board Governance (6:55)

E.4.1 Discussion of School Climate

E.4.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

F. FUTURE AGENDA ITEMS (7:20)

The Board will be asked to adopt the First Interim Budget.

G. ADJOURNMENT (7:25)

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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 15, 2022 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

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.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

B. CONSENT AGENDA (6:05 p.m.)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, October 20, 2022.

B.2 Audit Acceptance The Board is asked to accept the Independent Financial Audit for the 2021-2022 fiscal year.

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 School Director Report
E.2.2 Treasurer Report
E.2.3 SMPO Report

E.3 Action Items (6:40)

E.3.1 First Interim Budget The Board will adopt the First Interim Budget
Action Requested: Adopt First Interim Budget.

E.4 Board Governance (6:55)

E.4.1 Changes in the Brown Act: AB 2449

E.4.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

F. FUTURE AGENDA ITEMS (7:05)

The Board will be asked to receive the School Accountability Report Card (SARC).

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 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)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, October 20, 2022 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

Michelle Yezbick presented the Sherwood Montessori Land Acknowledgement.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

Russell Shapiro called the meeting to order at 6:01pm, Beth Hammer, Tina Hanson-Lewis, and Robyn Howley were in attendance. Jolynn Aaneson joined at 6:40pm.

B. CONSENT AGENDA

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, September 15, 2022.
B.2 Approval of Prop 39 Facilities Request Consider approval of Prop 39 Request for Facilities.
B.3 Unaudited Actuals Accept the Business Manager's Unaudited Actuals Report.

Robyn Howley motioned to approve Consent Agenda, Tina Aaneson seconded with unanimous approval of present 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.

No comments from the public.

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 School Director Report

E.2.2 Treasurer Report

Michelle Yezbick presented the School Director Report.
Pat Casey presented the Treasurer Report.

E.3 Action Items

E.3.1 Suicide Prevention Policy

State law requires that a Board of Education periodically review and update their Suicide Prevention Policy.

ACTION REQUESTED: Approve policy.

Michelle Yezbick presented Suicide Prevention Policy review and update. Tina Aaneson motioned to approve Suicide Prevention Policy update, Russell Shapiro seconded with unanimous approval from all board members.

E.3.2 Signers on Bank Account

The school needs updated signers on its bank account.

ACTION REQUESTED: Approve resolution to change bank account signers.

Russell Shapiro presented an updated list of signers on Sherwood Bank Account. Robyn Howley motioned to approve, Tina Aaneson seconded with unanimous approval from all board members.

E.4 Board Governance

E.4.1 Discussion of School Climate

Russell Shapiro discussed, with approval of the board, the current school climate. The board heard input from three members of the Sherwood community.

E.4.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

Russell Shapiro initiated a book discussion focused on Chapter 1.

F. FUTURE AGENDA ITEMS

The Board will be asked to adopt the First Interim Budget.

G. ADJOURNMENT

Meeting adjourned at 7:43 pm.

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CHICO UNIFIED
SCHOOL DISTRICT

Administrative Offices
1163 East Seventh Street
Chico, CA 95928-5999
530.891.3000
WWW.CHICOUSD.ORG

December 15, 2022

California State Controller's Office
Division of Audits
Financial Audits Bureau/LEA Unit
P.O. Box 942850
Sacramento, CA 94250-5874

Subject: 2021-22 Audit Extension for Sherwood Montessori Charter School (CDS #04-61424-0121475)

To Whom It May Concern:

Sherwood Montessori Charter School (the Charter) has requested an audit extension for their annual 2021-22 audit until January 13, 2023.

The Charter has incurred delays in finalizing their audit information due to changes with their chart of accounts during the 2021-22 school year to allow for better tracking of the various COVID-19/ARPA grant funds. This change resulted in the reclassification of restricted expenditures and revenues that were recognized in the previous audited financials to different classifications. This error extended into 2021-22 resulting in the incorrect identification of restricted revenues and expenditures. The finalization of the audit has been delayed while the Charter School works to restore 2020-21 restricted resource balances and correctly identify qualifying expenditures that are required to be tested in 2021-22. The Charter is currently working with the auditor to finalize the 2021-22 annual audit. The District is in agreement with the charter school that they would be best served to have these issues addressed before the final audit report is submitted. The District is granting the audit extension until January 13, 2023.

If you have any questions, please contact me at 530-891-3000 ext. 20127 or email me at cbromley@chicousd.org.

Sincerely,

Charise Bromley
Director, Fiscal Services

cc: Jaclyn Kruger, Assistant Superintendent of Business Services at Chico Unified
Tina Keene, Director of State and Federal Programs at Chico Unified
Michelle Yezbick, School Director, Sherwood Montessori Charter School
Patrick Casey, Business Manager, Independent Contractor
Joy McNulty, Partner, Horton McNulty & Saeteurn, LLP
Penny Timboe, Director of External Services at Butte County Office of Education

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **School Director Report**

Date: December 15, 2022

Administrative

- Updated enrollment will be reported at the meeting.
- I held a Town Hall on the evening of December 6th that was well-attended and provided good feedback from our educational partners. For members of our community who could not attend the live event, the recording has been made available on our school's website and linked to the school announcements with an invitation to email me to provide feedback or ask questions.
- The teachers and our administrative team have worked to update our report cards to now reflect the Essential Standards that were carefully chosen in English language arts and mathematics. These are the standards that will give our students the most leverage academically in the long run. Formative assessment data is being collected by all teachers now using a combination of tools to inform these report cards that will be sent home before the winter break.
- A list of employees, independent contractors, and interns to date follows. All positions are currently filled, but we are continuing to add to our substitute list as subs are in high demand.

Employees, Interns, and Independent Contractors

Office/Administration

Director	Michelle Yezbick
Administrative Assistant	Heather Fisher
Office Manager	Vanessa Aripez
Business Manager	Pat Casey

Special Education

Education Specialist	Happy Yasko
School Psychologist	Jolynn Aanenson
Speech and Language Pathologist	Anna Meehan
School Nurse	Natalie Wren
Occupational Therapist	Jen Moreno
Instructional Aide	Cori Balcom
Instructional Aide: Support	Marta Taylor

Behavioral Health Counselor	Elizabeth Rodriguez

General Education

TK/Kindergarten Teacher	Teresa Shippen
TK/Kindergarten Aide	Natalie Roberson
TK/Kindergarten Teacher	Adam Mankoski
TK/Kindergarten Aide	Kevin Paz
1st/2nd/3rd Teacher	Kim Powers
1st/2nd/3rd Aide	Sara Skeeters
1st/2nd/3rd Teacher	Anne Adams
1st/2nd/3rd Teacher	Marlo Knox
1st/2nd/3rd Aide	Juliette Madsen
4th/5th/6th Teacher	April Pearce
4th/5th/6th Aide	Danielle Moncrief
4th/5th/6th Teacher	Jessi Lusardi
4th/5th/6th Aide	Angelina Bushnell
7th/8th Teacher	Michael Whittemore

Specialists

Physical Education	Torey Colier/Kimberly Fellner
Wellness Counselor	Laura Swanson
Title 1 Reading Instructor	Maribel De La Cerda
MSW Intern	Emma Cuff
BSW Intern	Sariah Pilant
Custodians	Hernandez Cleaners
Maintenance & Landscaping	Andrew Bays

Extended Day-Child Care

Coordinator	Nisa Jones
Aide	Nora Horvath
Aide	Amy Navarro
Aide	Shawna Dorn
Aide	Briana Valdez
Aide	Sarah Kane

Community

- We will have had our Winter Performance at the time of this meeting, a community event we look forward to every year!
- The North Valley Community Foundation has awarded Sherwood a grant to work with the Rainforest Art Project to create a beautiful mosaic for our school. The Rainforest Art Project people are able to provide the funds needed to cover any costs above what the North Valley Community Foundation will provide, and we will have an opportunity for kids and adults in our community to work together to create a beautiful public art piece.

- I am working with our Wellness Counselor, Laura Swanson, to strengthen community and cohesion among our staff. Some of the action items include: putting together a Social Committee to organize get togethers, polling staff on what kinds of events they'd like to attend, and providing an anonymous survey tool for staff members to report if they have observed acts of racism or have been on the receiving end of racism at Sherwood. The work of building cohesion and positive culture among the adults is effort that benefits our students as well, and the work of dismantling the negative effects of racism will be ongoing as long as racism exists in our society.

Safety

- We have had high numbers of student and staff absences due to illness. As mentioned above, we continue to seek qualified substitute educators and assistants to add to our pool.

Legislative

- In early November I attended a webinar presented by Young, Minney & Corr, a charter law firm based in Sacramento, to learn about upcoming changes in the law that affect our school. Expectations for charter schools to operate more like district schools in terms of compliance with new statute has been a trend since the retirement Governor Jerry Brown.

SHERWOOD MONTESSORI

To: Board of Directors

From: Pat Casey, Business Manager

Subject: **Treasurer's Report**

Date: December 15, 2022 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 November 2022 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled 609,241.06 as of November 30, 2022 for the checking account.
- The expenses in November were for the normal operating cost.

Profit & Loss

- The November Profit & Loss report shows a Net Income of -$144,338, which will be offset by LCF funds deposited in December along with any State Grant funds.

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.

Sherwood Montessori
Profit & Loss YTD Comparison
July through November 2022

	Jul - Nov 22
Ordinary Income/Expense	
Income	
8000-Revenues	
8010-8099 Revenue Limit Sources	337,992
8110-8290 Federal Revenues	157,564
8300-8599 Other State Revenue	125,696
8600-8799 Other Local Revenue	1,270
Total 8000-Revenues	622,522
Total Income	622,522
Gross Profit	622,522
Expense	
1000 Certificated Salaries	282,065
2000 Classified Salaries	171,442
3000-Employee Benefits	136,569
4000-Books and Supplies	52,333
5000 Services/Other Op. Exp.	124,692
Total Expense	767,101
Net Ordinary Income	-144,579
Net Income	**-144,579**

Sherwood Montessori
Board of Directors - Vendor Payments Report
November 2022

Type	Date	Num	Name	Memo	Account
Check	11/01/2022	9565	E-rate Advisors	INV - 1616 FIRST HALF YEAR	Contracted Service
Check	11/01/2022	9566	KIM POWERS	Art materials-Guinea pig food	Instructional Supplies
Check	11/02/2022	9567	SARA SKEETERS	MILEAGE- PUMPKIN PATCH	5200-Travel and Con...
Check	11/02/2022	EFT	Comcast 4454	SERVICE - 2022 OCT-NOV	Internet Service Provi...
Check	11/02/2022	9571	KEVIN PAZ	MILEAGE- PUMPKIN PATCH	5200-Travel and Con...
Check	11/02/2022	9568	Steven Duke	TECHNICAL SUPPORT	Maintenance Supplies
Check	11/02/2022	9569	Kellie Sutterfield	Monthly pesticide service (Gr...	Pest Control
Check	11/02/2022	EFT	Laura Swanson	VISUAL TIMER- SAND TOO...	Counseling
Check	11/02/2022	EFT	California Water Service...	SERVICE - 2022 OCT	Water
Check	11/02/2022	DBT	Amazon.com	BRITA PITCHER FILTER	Office Supplies
Check	11/02/2022	DBT	Amazon.com	COLORED PENCILS	Office Supplies
Check	11/02/2022	DBT	Amazon.com	SHARPIE	Office Supplies
Check	11/02/2022	DBT	1 & 1 Internet Inc.	Internet hosting- 3MO. 2022 ...	Website, Hosting
Check	11/02/2022	DBT	Gateway Science Muse...	Gateway Science Museum fi...	LCAP
Check	11/03/2022	DBT	Amazon.com	GRABBER TOOL - TOTE BOX	Instructional Supplies
Check	11/03/2022	DBT	LAKEVIEW MONTESS...	MONTESSORI MATERIAL	LCAP
Check	11/07/2022	7404	Neighborhood Church	deposit for winter festival rental	Other Rentals
Check	11/07/2022	9572	ParentSquare	2022-23 Subscription	Contracted Service
Check	11/07/2022	9573	Hernandez Cleaning Se...	SERVICE 2022 OCT	Maintenance Supplies
Check	11/07/2022	DBT	Amazon.com	FRUIT SNACKS	Instructional Supplies
Check	11/07/2022	DBT	Amazon.com	SCOTCH MAGIC TAPE	Office Supplies
Check	11/08/2022	ACH	CharterSAFE	BILLED PREMIUM - LIABILI...	5400-Liability Insuran...
Check	11/08/2022	ACH	CharterSAFE	BILLED PREMIUM - WC 202...	3601-Workers Comp
Check	11/09/2022	dbt	Butte County Office of E...	PEARCE-FOUNDATIONS O...	Contracted Service
Check	11/09/2022	DBT	Amazon.com	SCOTCH MAGIC TAPE	Office Supplies
Credit...	11/09/2022		Microsoft	Subscription - MONTHLY	Software Licensing
Check	11/10/2022	9575	CORI BALCOM	LIVESCAN	LiveScan and TB Tes...
Check	11/10/2022	EFT	Jessica Lusardi	SOIL-BINDERS-MATH GAM...	Instructional Supplies
Check	11/11/2022	DBT	Beatniks	Meeting with Inspire HS Prin...	Food - Meetings
Check	11/13/2022	DBT	Amazon.com	3 RING BINDERS	Office Supplies
Check	11/13/2022	ACH	COSTCO VISA CARD	2022 15TH PURCHASES O...	SHERWOOD COST...
Check	11/14/2022	9570	Maia Illa, LCSW	Supervision-Swanson	Contracted Service
Check	11/14/2022	9574	Andrew Bays	LANDSCAPE MATERIALS I...	Maintenance Supplies
Check	11/14/2022	ACH	HP LEASE 7603	Lease Payment - Customer I...	HP DIRECT LEASE
Check	11/15/2022	DBT	Amazon.com	WATERCOLOR PAINT	Instructional Supplies
Check	11/15/2022	9576	Royal Aire Inc.	HVAC Service	HVAC Service
Check	11/15/2022	9578	Focal Point Landscape ...	LANDSCAPE MATERIAL - B...	Maintenance Supplies
Check	11/16/2022	DBT	PANERA BREAD	UE PBIS	Food - Meetings
Check	11/16/2022	EFT	Waste Management	SERVICE 2022 OCT	Trash/Recycling
Check	11/16/2022	9577	Royal Aire Inc.	HVAC Service	HVAC Service
Check	11/16/2022	9579	Advanced Document	SERVICE INV85551	Copier Lease
Check	11/17/2022	DBT	Wufoo	SERVICE 2022 NOV-DEC	Online List Managem...
Check	11/18/2022	EFT	Comcast Business 9110	SERVICE 2022 NOV-DEC	Internet Service Provi...
Check	11/18/2022	EFT	Verizon Wireless	SERVICE 2022 OCT-NOV	Telephone, Cellular
Check	11/18/2022	DBT	PG & E	SERVICE 2022 OCT-NOV	Electricity
Check	11/18/2022	9560	Chico Country Day	NATALIE WREN - NURSE -I...	Contracted Service
Check	11/18/2022	9580	Comcast Ethernet	Service-2742 2022 NOV	Ethernet - Fiberoptic
Check	11/18/2022	9581	Chico Electric	INV W12995	Facility Repairs
Check	11/18/2022	9582	Royal Aire Inc.	HVAC ANNUAL MAINTENA...	Contracted Service
Check	11/25/2022	9561	National Life Group	EMPLOYER SHARE- 2022 ...	3903-Other Employe...
Check	11/29/2022	9585	Hernandez Cleaning Se...	REIMB SUPPLIES	Maintenance Supplies
Check	11/29/2022	9586	Maia Illa, LCSW	Supervision-Swanson INV 6	Contracted Service
Check	11/29/2022	EFT	Jessica Lusardi	FISH TANK+ROCKS	Instructional Supplies
Check	11/29/2022	EFT	Laura Larsen	TOYS-GAMES-PLUSHY	Instructional Supplies
Check	11/29/2022	9587	Royal Aire Inc.	SERVICE- 5 CAPACITORS	Contracted Service
Check	11/29/2022	DBT	TEA BAR CAFE	Meal - UE Meeting -LCAP	Food - Meetings
Bill	11/30/2022	2022/2...	Pat Casey	NOVEMBER 2022 CONTRA...	Business Manager S...
TOTAL					

Amount
750.00
97.17
22.00
232.07
13.44
195.00
85.00
33.14
49.03
24.66
71.27
9.31
45.00
95.00
146.83
295.95
2,450.00
2,500.00
5,750.00
24.21
32.16
3,000.00
748.00
41.90
6.41
9.75
64.00
295.25
20.62
16.46
1,822.13
320.00
1,369.50
316.21
12.36
79.00
230.59
38.82
133.76
117.00
494.22
19.00
180.55
93.38
464.10
1,291.91
3,489.40
262.50
1,454.00
500.00
117.22
320.00
74.98
94.76
565.00
69.82
4,400.00
35,453.84

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Heather Fisher, Administrative Assistant

Subject: **SMPO Report**

Date: December 15, 2022

We decided to do something a little different this year with the SMPO. Instead of giving individual roles such as president, etc., we chose to have the parents that wanted to be actively involved become a team and we now refer to them as the SMPO Leadership Team. I act as a liaison between the school and the members of the SMPO team. This shift allows members who have the most time available at the time to help with events. So far, we have had two very successful events, the Fall Festival and more recently the Winter Performance. Different members of the SMPO team were able to contribute more to each event allowing for an even distribution of responsibilities. As a liaison I have been able to make sure we stick to deadlines and assist with things that are more easily done from the office. I intend to make a master list with a timeline for each of our regular events to make the process even smoother in the future.

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **1st Interim Budget**

Date: December 15, 2022

SUMMARY

Business Manager Pat Casey has prepared a 1st Interim Financial Report that needs to be adopted by the Board before being sent to CUSD, BCOE, and the CDE.

DISCUSSION

The revised budget now includes the 5% increase to current salaries and positions, and projected expenditures and revenues for the current fiscal year.

State revenue have been increased because it is now based on an estimated 100 ADA and the latest LCF calculation.

Expenses for salaries and benefits now include all position additions and deletions and the increase approved in the salary schedules and employee benefits. STRS and PERS were both increased by over 3% with no offset from the state.

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, Interns).

The net ending balance is projected to be $135,113 assuming no lower than 100 ADA funded by the state.

ACTION REQUESTED

Adopt Interim Budget

Attachment: Draft First Interim Budget

2022-23 6/16/2022	FUNDING AT 112 ADA	FUNDING AT 100 ADA		
ORIGINAL	**2022-23 ORIGINAL BUDGET**	**2022-23 1st INTERIM BUDGET**	**CHANGE**	
Revenue				
8011 Local Control Funding	590,553	509,801		
8012 Education Protection Act	284,969	269,246		
8096 In Lieu Taxes	261,945	318,000		
Subtotal LCFF Revenues	***1,137,467***	***1,097,047***	***(40,420)***	
8290 - ELO-G/ELO-P IPI		**50,000**	50,000	
8290 - ESSER II & III		**150,000**		
8290 - ESSER III-3213	***40,000***			
8290 - ESSER III-3214	***10,000***			
8290 - ESSER TOTAL	50,000	**200,000**	150,000	
8181 Spec. Educ.- SELPA Fed	6,000	2,000	(4,000)	
8311 Spec. Educ. - SELPA State	80,000	80,000	-	
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	***20,000***	***50,000***	30,000	
8590 - ELO-P	***20,000***	***40,000***	20,000	
8590 - PRE-K PLAN-IMPLEMENT		***25,000***		
8590 - AMIM		***65,000***		
8699 Other Local Revenue	3,000	3,000	-	
TOTAL REVENUES	**1,351,967**	**1,597,547**	***205,580***	
Expense				
1000 Certificated Salaries	521,600	584,880	63,280	30%
2000 Classified Salaries	442,932	615,201	172,269	32%
3000 Employee Benefits	311,609	347,156	35,547	18%
SUBTOTAL	***1,276,141***	***1,547,237***	271,096	80%
4100 Texts and Core Curricula	3,000	500	(2,500)	
4200 Reference Materials	3,000	8,000	5,000	
4300 Materials and Supplies	24,250	36,000	11,750	
4400 NonCap Equipment	4,000	-	(4,000)	
4700 Food (Nutrition)	10,000	8,000	(2,000)	
SUBTOTAL	***44,250***	***52,500***	8,250	3%
5200 Travel and Conferences	3,000	3,000	-	
5300 Dues and Memberships	2,900	1,700	(1,200)	
5400 Property/Liability Insurance	35,000	38,000	3,000	
5500 Operations / Housekeeping	96,800	101,800	5,000	
5600 Rentals, Leases, and Repairs	13,600	12,500	(1,100)	
5800 Prof. & Consulting Services	183,024	159,700	(23,324)	4%
5900 Communications	15,300	12,700	(2,600)	
SUBTOTAL	***349,624***	***329,400***	(20,224)	17%
6200 CAPITAL OUTLAY- BLDG			-	
TOTAL EXPENDITURES	**1,670,015**	**1,929,137**	**259,122**	100%
Net Income	***(252,801)***	***(331,590)***	**ADA Equiv.**	**-33**
Unassigned/Unappropriated - Prior Year	**500,293**	**550,888**		
Unassigned/Unappropriated - Proj. Yr End	**247,492**	**219,298**	**ADA Equiv.**	**22**
Reserve - Economic Uncertainties	**120,000**	**124,298**	**Est. 1 mos. salary/benes.**	
Total - Unassigned/Economic Uncertainty	**127,492**	**-**	**ADA Equiv.**	**0**

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Changes in the Brown Act: AB 2449**

Date: December 15, 2022

SUMMARY

The California legislature has passed AB 2449 which enacts changes in the Brown Act.

DISCUSSION

Beginning January 1, 2023, members of public boards of directors will be subject to changes in the teleconferencing laws for public meetings.

- At least a quorum of the members of the legislative body must participate in person from a singular physical location identified on the agenda, is open to the public and within the boundaries of the local agency.
- A member may only teleconference for publicly disclosed "just cause" or in "emergency circumstances" approved by the legislative body if one of the following are met:
  1. the member notifies the legislative body at the earliest opportunity possible, including at the start of a regular meeting, of their need to participate remotely for "just cause" or
  2. the member requests the legislative body to allow them to participate in the meeting remotely due to "emergency circumstances" and the legislative body takes action to approve the request. The legislative body must request a general description (generally not exceeding 20 words) of the circumstances relating to their need to appear remotely at the given meeting.
- "Just cause" is limited to one or more of the following: (i) a childcare or caregiving need of a child, parent, grandparent, grandchild, sibling, spouse, or domestic partner that requires them to participate remotely; (ii) a contagious illness that prevents a member from attending in person; (iii) a need related to a physical or mental disability as defined by statute; or (iv) travel while on official business of the legislative body or another state or local agency.
- "Emergency circumstances" means a physical or family medical emergency that prevents a member from attending in person.
- A member may only teleconference for a limited number of meetings: Not more than three consecutive months or 20% of the regular meetings within a calendar year, or more than two meetings if the legislative body meets fewer than 10 times per calendar year.

- Members participating remotely must do so through both audio and visual technology and must publicly disclose whether any individual over the age of 18 is present at the remote location with the member.
- The legislative body must also provide either a two-way audiovisual platform or two-way telephonic service and a live webcasting of the meeting to allow the public to remotely hear and visually observe the meeting, and remotely address the legislative body.
- The agenda must identify and include an opportunity for all persons to attend via a call-in option, internet-based service option, and at the in-person location of the meeting.

The remote meeting rules enacted in AB 361 will expire on January 1, 2024, or once the COVID State of Emergency is lifted, which is now expected to occur on February 28, 2023.
AB 2449's rules remain in effect through 2025. After January 1, 2026, unless further legislation is adopted, only the pre-pandemic, traditional Brown Act rules will remain in effect.

ACTION REQUESTED
Discuss changes in Brown Act under AB 2449.

SHERWOOD MONTESSORI

REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS

Physical Address: 1071 E. 16th Street, Room 3, Chico CA 95973

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)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, January 19, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

B. CONSENT AGENDA (6:05 p.m.)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, December 15, 2022.

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.2 Audit Acceptance The Board is asked to accept the Independent Financial Audit for the 2021-2022 fiscal year.

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 School Director Report

E.2.2 Treasurer Report

E.3 Action Items (6:40)

E.3.1 Parent Participation Policy The Board will be asked to approve changes to the Parent Participation Policy.

Action Requested: Approve changes to Parent Participation Policy.

E.3.2 Budget Committee The Board will consider approval of Budget Committee members.

E.4 Board Governance (6:55)

E.4.1 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

F. FUTURE AGENDA ITEMS (7:05)

The Board will be asked to receive the School Accountability Report Card (SARC).

G. CLOSED SESSION (7:10)

Pursuant to 54954.5.(j) Concerning a charge or complaint involving information protected by federal law.

H. ADJOURNMENT (7:40)

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, December 15, 2022 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.) *Meeting called to order at 6:05 pm.*

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

Michelle Yezbick presented land acknowledgement

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.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

All board members present.

B. CONSENT AGENDA (6:05 p.m.)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, October 20, 2022.

B.2 Audit Acceptance The Board is asked to accept the Independent Financial Audit for the 2021-2022 fiscal year.

Jolynn Aanenson motioned to approve minutes, seconded by Tina Hanson-Lewis.

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 School Director Report

Michelle Yezbick presented School Director Report.

E.2.2 Treasurer Report

Pat Casey presented the Treasurer Report.

E.2.3 SMPO Report

Russell Shapiro presented the SMPO 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.

E.3 Action Items (6:40)

E.3.1 First Interim Budget The Board will adopt the First Interim Budget
Action Requested: Adopt First Interim Budget.

Russell Shapiro discussed the first interim budget, Pat Casey answered questions regarding the budget.

Robyn Howley motioned to approve; Jolynn Aanenson seconded. All board members approved.

E.4 Board Governance (6:55)
E.4.1 Changes in the Brown Act: AB 2449

Russell presented an update on changes in the brown act.

E.4.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

Book discussion tabled until next meeting.

F. FUTURE AGENDA ITEMS (7:05)
The Board will be asked to receive the School Accountability Report Card (SARC).

G. ADJOURNMENT (7:10)

Meeting adjourned at 7:09 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: January 19, 2023

Administrative

- Updated enrollment will be reported at the meeting.
- Sherwood has been awarded the Phase 3 California MTSS Grant-MTSS stands for Multi-Tiered System of Support. The grant will support Sherwood in providing professional development to complete the CA MTSS Pathway Certification

Employees, Interns, and Independent Contractors

- We are currently seeking a new Extended Day Aide as Amy Navarro's schedule has changed with the new semester; Amy will stay on with us as a substitute for classified staff.
- Hunter Milkovitz has returned to Sherwood to fill the role of Instructional Aide in Kim Power's lower elementary classroom. Hunter was with Kim in the 2020-2021 school year.

Community

- Our Open House was well-attended, the weather gave us a break! It was a joy to see the students showing off their work and their classrooms to their family members.

Safety

- Our County Superintendent of Schools has been in touch about emergency preparedness regarding the extreme weather we have been having. Sherwood is part of a network that will be kept apprised of any needed actions to respond in the case of an emergency.

SHERWOOD MONTESSORI

To: Board of Directors

From: Pat Casey, Business Manager

Subject: **Treasurer's Report**

Date: January 19, 2023 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 2022 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 624,447.60 as of December 30, 2022 for the checking account.
- The expenses in December were for the normal operating cost.

Profit & Loss

- The December Profit & Loss report shows a Net Income of $ 74, which will be increased by December LCF funds deposited in January 2023 along with any State/Fed Grant funds.

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.

Sherwood Montessori
Profit & Loss YTD Comparison
December 2022

	Dec 22
Ordinary Income/Expense	
Income	
8000-Revenues	
8010-8099 Revenue Limit Sources	75,746
8110-8290 Federal Revenues	1,600
8300-8599 Other State Revenue	92,915
8600-8799 Other Local Revenue	14,501
Total 8000-Revenues	184,762
Total Income	184,762
Gross Profit	184,762
Expense	
1000 Certificated Salaries	63,155
2000 Classified Salaries	51,273
3000-Employee Benefits	33,105
4000-Books and Supplies	5,379
5000 Services/Other Op. Exp.	31,777
Total Expense	184,688
Net Ordinary Income	74
Net Income	**74**

Sherwood Montessori
Board of Directors - Vendor Payments Report
December 2022

Type	Date	Num	Name	Memo	Account
Check	12/01/2022	ACH	CharterSAFE	BILLED PREMIUM - LIABILI...	5400-Liability Insuran...
Check	12/01/2022	ACH	CharterSAFE	BILLED PREMIUM - WC 202...	3601-Workers Comp
Check	12/01/2022	DBT	Gopher	PE equipment	PE
Check	12/01/2022	DBT	Amazon.com	FILTERS	Instructional Supplies
Check	12/01/2022	9588	CUSD	2022 FUA - INV 23-00067 O...	CUSD FUA Charges
Check	12/01/2022	9589	Steve Duke	INV 003 TECHNICAL SUPP...	Contracted Service
Check	12/01/2022	ACH	Macquarie Equipment C...	Kyocera Copier Lease 2022 ...	Copier Lease
Check	12/02/2022	DBT	Amazon.com	AIR PURIFIER FILTER	Instructional Supplies
Check	12/04/2022	DBT	Amazon.com	FILTERS	Instructional Supplies
Credit...	12/05/2022		Mendes Supply Co.	COPY PAPER	Custodial Supplies
Credit...	12/05/2022		Mendes Supply Co.	SOAP-PAPER TOWELS	Custodial Supplies
Check	12/05/2022	EFT	California Water Service...	SERVICE 2022 NOV	Water
Check	12/05/2022	EFT	Comcast 4454	SERVICE - 2022 NOV-DEC	Internet Service Provi...
Check	12/05/2022	9590	Hernandez Cleaning Se...	INV 68567	Contracted Service
Check	12/05/2022	9591	Kellie Sutterfield	Monthly pesticide service (Gr...	Pest Control
Check	12/05/2022	9592	KEVIN PAZ	MILEAGE- PUMPKIN PATCH	5200-Travel and Con...
Credit...	12/06/2022		Mendes Supply Co.	fee	Custodial Supplies
Check	12/07/2022	DBT	Amazon.com	BATTERIES	Instructional Supplies
Check	12/08/2022	DBT	Amazon.com	BALL PUMP NEEDLE	Instructional Supplies
Check	12/08/2022	DBT	Amazon.com	SUPPLIES	Extended Day
Check	12/08/2022	DBT	Amazon.com	FILE FOLDERS	Office Supplies
Check	12/08/2022	DBT	Amazon.com	FILE FOLDERS	Office Supplies
Check	12/08/2022	DBT	Amazon.com	BATTERIES - REFUNDED CR	Instructional Supplies
Credit...	12/09/2022		Microsoft	Subscription - MONTHLY	Software Licensing
Check	12/09/2022	DBT	Amazon.com	SCOTCH TAPE	Instructional Supplies
Check	12/09/2022	DBT	Amazon.com	THERMAL POUCHES	Office Supplies
Check	12/09/2022	DBT	Amazon.com	BINDER CLIPS	Office Supplies
Check	12/09/2022	DBT	Amazon.com	FELT ROLL	Instructional Supplies
Check	12/09/2022	DBT	Amazon.com	BALL PUMP NEEDLE	PE
Check	12/09/2022	DBT	Amazon.com	BATTERIES	Office Supplies
Check	12/09/2022	DBT	FoodMaxx	BATTERIES	Office Supplies
Check	12/09/2022	DBT	Costco	SNACKS	Food - Meetings
Check	12/09/2022	DBT	Amazon.com	FOAM BEADS - REFUND CR	Instructional Supplies
Check	12/10/2022	DBT	Amazon.com	BALL PUMP NEEDLE - REF...	Instructional Supplies
Check	12/10/2022	DBT	Amazon.com	SCOTCH TAPE - REFUND CR	Instructional Supplies
Check	12/12/2022	DBT	Amazon.com	FOAM BEADS-PIPE CLEAN...	Extended Day
Check	12/12/2022	DBT	Amazon.com	BINDER CLIPS - REFUNDED	Instructional Supplies
Check	12/13/2022	DBT	Amazon.com	GEL INK PENS	Instructional Supplies
Check	12/13/2022	DBT	Amazon.com	VINYL STICKERS	Instructional Supplies
Check	12/13/2022	DBT	Amazon.com	FILE FOLDERS	Office Supplies
Check	12/13/2022	DBT	Amazon.com	DARK NEON STICKERS	Instructional Supplies
Check	12/13/2022	DBT	NCS Pearson INC.	WAIT-III QTY 25	4100-Textbooks/Cor...
Check	12/13/2022	DBT	Costco	SUPPLIES	Office Supplies
Check	12/13/2022	DBT	Costco	PIZZAS- WINTER PERFOR...	Office Supplies
Check	12/14/2022	DBT	Amazon.com	HEPA FILTERS	Office Supplies
Check	12/15/2022	DBT	Amazon.com	BATTERIES	Instructional Supplies
Check	12/15/2022	DBT	Amazon.com	BEACH TOYS	Instructional Supplies
Check	12/15/2022	EFT	Laura Swanson	LIGHTS AND COVER	Counseling
Check	12/15/2022	EFT	Waste Management	SERVICE 2022 NOV	Trash/Recycling
Check	12/15/2022	9594	Advanced Document	3456600	Copier Lease
Check	12/15/2022	9595	Andrew Bays	LANDSCAPE MATERIALS R...	Maintenance Supplies
Check	12/15/2022	ACH	HP LEASE 7603	Lease Payment - Customer I...	HP DIRECT LEASE
Check	12/15/2022	ACH	IRS USATAXPYMT	LATE PYMT FEE	Intuit Payroll Service
Check	12/16/2022	9596	Hernandez Cleaning Se...	INV 0135 HOURS	Contracted Service
Check	12/16/2022	9597	Meagan Fischer	LIVESCAN	LiveScan and TB Tes...
Check	12/16/2022	9598	HealthEquity	POP SERVICE FEE	3903-Other Employe...
Check	12/19/2022	DBT	Western Psychological ...	TAPS-4 COMPLETED KIT	Instructional Supplies
Check	12/19/2022	DBT	Wufoo	SERVICE 2022 DEC- 2023 J...	Online List Managem...
Check	12/19/2022	DBT	BARNES & NOBLE BO...	TOKYO REVENGERS	4200-Books/referenc...
Check	12/20/2022	ACH	COSTCO VISA CARD	2022 15TH PURCHASES N...	SHERWOOD COST...
Check	12/20/2022	EFT	Laura Swanson	LIGHTS-BULBS	Counseling
Check	12/20/2022	EFT	Laura Swanson	PROTECTIVE MAT	Counseling
Check	12/20/2022	EFT	PG & E	0549373957-6	Electricity
Check	12/20/2022	9599	Comcast Ethernet	Service-2742 2022 NOV	Ethernet - Fiberoptic

Type	Date	Num	Name	Memo	Account
Check	12/20/2022	9600	Barbara Mandelbaum	Federal funding allocation - I...	Grant Services
Check	12/20/2022	EFT	Comcast Business 9110	SERVICE 2022 DEC	Internet Service Provi...
Check	12/20/2022	DBT	Amazon.com	NR	Instructional Supplies
Check	12/22/2022	9601	CUSD	2022 FUA - INV 23-00082 N...	CUSD FUA Charges
Check	12/22/2022	9602	Andrew Bays	LANDSCAPE HOURS INV 1...	Contracted Service
Check	12/22/2022	9603	CALIFORNIA STATE U...	Paid intern INV-012362	Contracted Service
Check	12/22/2022	9604	Jenna Johnson, LLSW, ...	Classroom observation and ...	Contracted Service
Check	12/22/2022	9605	PARK AVENUE PEST ...	INV 587516 587417	Pest Control
Check	12/23/2022	DBT	Amazon.com	PRIME FEE	Contracted Service
Check	12/27/2022	9583	National Life Group	EMPLOYER SHARE- 2022 ...	3903-Other Employe...
Check	12/27/2022	9584	Chico Country Day	NATALIE WREN - NURSE -I...	Contracted Service
Bill	12/31/2022		Pat Casey	INV 2022/23-6 DECEMBER ...	Business Manager S...
Check	12/31/2022			Service Charge	Bank Fees
TOTAL					

Amount
3,000.00
748.00
516.96
29.75
2,823.93
75.00
302.95
29.75
29.75
791.83
1,725.21
46.46
243.89
4,500.00
85.00
13.44
5.00
25.73
6.42
97.90
14.09
18.67
25.73
9.75
43.96
64.34
11.79
32.16
6.42
18.22
10.71
286.31
16.98
6.42
43.96
16.98
11.79
33.22
13.93
14.09
8.57
220.02
66.24
128.06
128.69
18.22
21.96
52.53
133.76
372.44
577.88
316.21
413.60
1,805.00
32.00
100.00
271.35
19.00
30.65
785.87
46.10
22.89
1,020.17
2,519.92

Amount
130.00
180.55
10.67
1,792.28
1,105.50
1,500.00
1,312.50
120.61
16.08
500.00
1,291.91
4,400.00
27.00
37,294.72

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Changes to the Parent Participation Policy**

Date: January 19, 2023

SUMMARY

As a Title 1 school, Sherwood is required to review and update its Parent Participation Policy annually.

DISCUSSION

The proposed changes to the Parent Participation Policy reflect input from parents regarding the structure of the Sherwood Montessori Parent Organization (SMPO).

ACTION REQUESTED

Adopt changes to policy.

Attachment: Parent Participation Policy with suggested revisions.

SHERWOOD MONTESSORI

Parent Participation Policy

Sherwood Montessori is a community-based, child-centered Montessori school that ~~and~~ values the contribution of parents toward nurturing their child's education. Parent involvement takes many forms ranging from support of the child at home to school volunteerism. Parent participation at school will be managed through teacher direction based on classroom needs respecting all students. While parent involvement is considered an important component of Sherwood Montessori, it is essential that parents work with teachers and the Director to ensure that the focus of the school remains *child-centered*. To this end, this Policy sets forth guidelines for the best means of enabling parent participation at Sherwood Montessori.

Sherwood Montessori Parent Organization

The Sherwood Montessori Parent Organization (SMPO) is an exciting opportunity for parents to contribute to the governance and maintenance of the school. Meetings will be regularly scheduled and all parents/guardians will be encouraged to be active participants in the organization. ~~The SMPO will be self-governed by an elected panel of three parents, serving staggered two-year terms, chosen through an open vote of all parents prior to the annual April Meeting of the Board of Directors. The initial governing panel will be voted in at the first opportunity upon formal establishment of the SMPO Guidelines, and will serve one-, two-, and three-year terms based on straw vote. A representative of the SMPO will serve as a non-voting member of the Board of Directors and will be responsible for communication between the SMPO and the Board.~~

One of the main tasks of the SMPO will be the organization of volunteer and service activities. Activities include fostering community spirit through outreach, helping to welcome new families, promoting the school in the greater community, fundraising and implementing parental educational programs. Parents are invited to participate in their ~~children"s~~children's education by volunteering at Sherwood Montessori by:

- Serving our teachers by sharing their interests/skills with the children;
- Building our community through school-wide activities;
- Support fundraising activities;
- Being active members~~/officers~~ and leaders of the SMPO;
- Chaperoning/driving for field trips;
- Laminating, cutting, photocopying, and typing;
- Assisting with classroom celebrations and book fairs;
- Participating in committees formed through the parent group;
- Assisting the Director or any staff member on short- or long-term projects;
- Planning educational programs of interest to parents; and
- Organizing parent and/or family social events

Parents will identify their strengths and skills through a “Parent Involvement Questionnaire.” Volunteers will also be called upon to support the school with specialized tasks as needed, such as classroom support and maintenance on the school grounds.

~~The SMPO will also annually update and distribute a Parent Handbook that will outline the unique roles parents play in the school"s mission. The handbook will include resources regarding Montessori education, and discuss ways the educational system can be incorporated at home. The SMPO will also assist the Board of Directors and staff, in offering occasional educational workshops for parents to attend on a voluntary basis. The SMPO may charge a nominal fee for material operations; this fee will be approved by the Board of Directors.~~ Through educational and volunteer opportunities, the collaboration of parents, staff and students will be enhanced. The leadership of the SMPO will encourage this spirit of shared ownership and will rely upon the Board of Directors, administration and teaching staff to suggest avenues of involvement.

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Classroom Observation

In order for parents to be actively engaged in their child’s education, it will be important for parents to understand the routines and curriculum that are expressed in the classroom. Parents are welcome to visit the classroom and observe their child’s learning and social experience at Sherwood Montessori. An observation can be arranged by teacher and parent. A Montessori classroom is an amazing environment that is child-centered, where the children take ownership and the teacher becomes more of a guide and an observer than the focus. As a public school, Sherwood Montessori also must take precautions to ensure that state regulations and safety procedures are followed. All visitors, including parents, must check in with the office during school hours. Each classroom has its own, age-appropriate schedule so parents are asked to arrange a best-time with the teacher for observation prior to scheduling a visit. Ultimately, the parents are encouraged to respect that the teacher is “in charge” of the classroom.

Classroom Volunteers

The focus of the Montessori classroom is on child ownership of the learning process. Through continued, concentrated work of their own choice, children grow in inner discipline and peace. Therefore, Montessori classrooms do not rely on adult aides to the same extent as other types of schools. At the same time, it is acknowledged that the parents of Sherwood Montessori are a diverse resource, with a treasure of skills and enthusiasm. To optimize parent involvement, parents will fill out the “Parent Involvement Questionnaire” to identify the skills they would like to share with the children. The role of participation will be handled at the discretion of the teacher and Director. Teachers will be encouraged to make use of classroom volunteers as a way of respecting both the joy of the parents and its positive impact on the children. Teachers will ensure that parent volunteers are not alone with a child in an enclosed space while volunteering at the school, as per safety protocols.

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Budget Committee Members**

Date: January 19, 2023

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 has served on the Budget Committee in years past.

ACTION REQUESTED: Approve Beth Hammer and Russell Shapiro as members of the Budget Committee.

SHERWOOD MONTESSORI

REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS

Physical Address of Meeting: 2465 Carmichael Dr. Chico, California, 95928
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)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, February 16, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

B. CONSENT AGENDA (6:05 p.m.)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, January 19, 2022.
B.2 Audit Extension The audit deadline is extended until February 28.

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 Board Report

E.3 Action Items (6:40)

E.3.1 Dashboard Data The School Director will present a report on Sherwood's Dashboard from the California Department of Education.
Action Requested: Discuss Dashboard Data.

E.3.2 Arts, Music, and Instructional Materials (AMIM) Discretionary Block Grant The Board will consider adoption of a plan for the AMIM funds.
Action Requested: Approve spending plan for AMIM.

E.3.3 School Accountability Report Card (SARC) The Board will be asked to approve the SARC.
Action Requested: Approve SARC.

E.3.4 Safety Plan The Board will be asked to approve the updated Comprehensive School Safety Plan.
Action Requested: Approve Safety Plan.

E.3.5 School Plan for Safe Operations During Pandemic The Board will be asked to approve the updated School Plan for Safe Operations During Pandemic.
Action Requested: Approve updated plan.

E.4 Board Governance (6:55)

E.4.1 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

F. FUTURE AGENDA ITEMS (7:05)

The Elections Committee will report on recruitment efforts.
The Board will be asked to accept the Independent Financial Audit for the 2021-2022 fiscal year.

G. ADJOURNMENT (7:40)

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SHERWOOD MONTESSORI

REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS

Physical Address: 1071 E. 16th Street, Room 3, Chico CA 95973

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)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, January 19, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)
Call to order 6:02 pm

B. A.1 Land Acknowledgement
Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

Russell Shapiro, Robyn Howley, Jolynn Aanenson and Tina Hanson-Lewis present. Beth Hammer absent

C. CONSENT AGENDA (6:05 p.m.)

C.1 Minutes Approval Consider approval of minutes from Regular Meeting, December 15, 2022.

C.2 Audit Acceptance The Board is asked to accept the Independent Financial Audit for the 2021-2022 fiscal year.

Audit received extension, no vote today

Robyn Howley motioned to approve consent agenda, x seconded, approved by all present board members

Commented [RH1]: I didn't write down who seconded apparently.

D. 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.

E. NOTICED PUBLIC HEARINGS None

F. REGULAR BUSINESS (6:20)

F.1 Items Removed from Consent (If any)

F.2 Reports and Communications (6:20)

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

F.2.1 School Director Report
Michelle Yezbick presented

F.2.2 Treasurer Report
Pat Casey presented

F.3 Action Items (6:40)

F.3.1 Parent Participation Policy The Board will be asked to approve changes to the Parent Participation Policy.

Action Requested: Approve changes to Parent Participation Policy.

Michelle Yezbick presented the parent participation policy update as required for a title 1 school. Jolynn Aanenson motioned to approve, Russell Shapiro seconded, unanimous approval by all present board members.

F.3.2 Budget Committee The Board will consider approval of Budget Committee members.

Russell Shapiro recommended Beth Hammer and Russell Shapiro as Budget Committee members. Robyn Howley motioned to approve, Tina Hanson-Lewis seconded, unanimous approval by all present board members.

F.4 Board Governance (6:55)

F.4.1 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

Russell Shapiro led book discussion.

G. FUTURE AGENDA ITEMS (7:05)

The Board will be asked to receive the School Accountability Report Card (SARC).

H. CLOSED SESSION (7:10)

Pursuant to 54954.5.(j) Concerning a charge or complaint involving information protected by federal law.

Exited closed session at 7:23 pm

I. ADJOURNMENT (7:40)

Meeting adjourned at 7:26pm.

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CHICO UNIFIED
SCHOOL DISTRICT

Administrative Offices
1163 East Seventh Street
Chico, CA 95928-5999
530.891.3000
WWW.CHICOUSD.ORG

January 31, 2023

California Department of Education
School Fiscal Services Division
Audit Resolution Staff
1430 N Street, Suite 3800
Sacramento, CA 95814

Subject: 2021-22 Third Audit Extension for Sherwood Montessori Charter School (CDS #04-61424-0121475)

To Whom It May Concern:

Sherwood Montessori Charter School (the Charter) has requested a third audit extension for their annual 2021-22 audit until February 28, 2023. The second audit extension was approved until January 31, 2023.

The Charter has incurred delays in finalizing their audit information due to changes with their chart of accounts during the 2021-22 school year to allow for better tracking of the various COVID-19/ARPA grant funds. This change resulted in the reclassification of restricted expenditures and revenues that were recognized in the previous audited financials to different classifications. This error extended into 2021-22 resulting in the incorrect identification of restricted revenues and expenditures. The finalization of the audit has been delayed while the Charter School works to restore 2020-21 restricted resource balances and correctly identify qualifying expenditures that are required to be tested in 2021-22. The Charter is currently working with the auditor to finalize the 2021-22 annual audit. The District is in agreement with the charter school that they would be best served to have these issues addressed before the final audit report is submitted. The District is granting the third audit extension until February 28, 2023.

If you have any questions, please contact me at 530-891-3000 ext. 20127 or email me at cbromley@chicousd.org.

Sincerely,

Charise Bromley
Director, Fiscal Services

cc: Jaclyn Kruger, Assistant Superintendent of Business Services at Chico Unified
Tina Keene, Director of State and Federal Programs at Chico Unified
Michelle Yezbick, School Director, Sherwood Montessori Charter School
Patrick Casey, Business Manager, Independent Contractor
Joy McNulty, Partner, Horton McNulty & Saeteurn, LLP
Penny Timboe, Director of External Services at Butte County Office of Education

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Instructional Staff Report**

Date: February 16, 2023

Instructional Staff was asked to respond to the theme: How would you like to see Sherwood in 5 years?

Transitional Kindergarten/Kindergarten -Teresa Shippen

I have had the privilege of being part of the Nor Cal Leadership Consortium training, and several trainings through the Butte County Office of Education on how to prepare for UTK (Universal Transitional Kindergarten) as they phase in younger students over the next few years. Our Montessori TK/K classrooms are set up with curriculum and Materials to accommodate the educational needs of students from 3-6 years of age. We are in this great position thanks to the forethought of our first board who sought grants to fully supply our classrooms with our beautiful Montessori Materials. My vision for our next five years is to really grow this part of our program in the hopes that it will provide our students with a true Montessori foundation, and help stabilize our enrollment. Having said that, I don't want to see our school grow much beyond 150 enrollment, but I do want to see a steady stream of families interested in our program.

My vision:

- We enjoy the deep collaboration and camaraderie of experienced staff who provide a stable but strong and growing program
- We welcome well trained Instructional Aides and extended day staff who see their role as both helping their students, and contributing to their long term educational career growth
- We are at our current site, with resources invested in our students, staff, and program to help families engage in our Montessori method of learning
- The site is embellished with trees and gardens which form natural gathering areas and the subject of lessons, a beautiful place to learn
- Our school and our programs are well established in the community, with market surveys reflecting strong awareness and desire to attend our school
- We are providing a welcoming and educationally strong environment to accommodate the diverse needs of our community

Transitional Kindergarten/Kindergarten -Adam Mankoski

In five years, I would like to see Sherwood be more self-sufficient. Self-sufficiency in my eyes, includes facilities, but also any aspect of our program that affects student recruitment, student retention, family engagement and community well-being, including our food program and our after-school care, two programs that are wildly incongruous with the core of Montessori philosophy. Specifically, I'd like us to be in a more inspiring environment and less institutional facility that is more aligned with our mission, a space that can accommodate student performances, whole school gatherings, promotes collective culture and exploratory learning, and a more fluid student experience. I feel like our dependence on the school district limits our creativity and prevents us from from fully realizing some of the ideas for our work and environments that could really set us apart.

An essential aspect of our independence is a wholistic field to fork food program, one that incorporates a year-round garden and food preparation program that weave practical life and academics. Food security, food preparation and meal sharing create student security, a peaceful environment and cement the collective culture that I try to promote in my class. I would personally like to have a budget to make daily lunch preparation and meal sharing a core element of our workday. But in the long run, I'd like a school-wide food program that incorporates peer-led cooking, student led food service, a focus on practical life skills for our youngest students and a trade focus for our oldest students.

In my ideal world, I'd also like to see a shift in our focus to a community service-based model, where each class is responsible for a project related to service in our community. My class is currently assisting the neighborhood Baptist church with its community garden, a program that makes a real impact on food security in Chapman neighborhood, and have adopted Guill Street, our cross street at 1010, as our weekly neighborhood trash cleanup area. Older students could design projects that are even more robust, reinforcing Maria Montessori's philosophy that we all connected, all responsible for one another, and should be stewards of our communities.

1st/2nd/3rd -Kim Powers

I'm really excited about this question! I love having goals and direction. In my ideal world, Sherwood would be a highly sought-after school. We would be at maximum capacity with a waiting list for many grades, especially TK/K. When community members look at our online ratings, they will see excellence in all areas, including academics. We have a lot of things going for us, particularly really good ratings for diversity, community and low student-teacher ratios, but our academic performance could improve. This leads me to thoughts of who our audience is. What kinds of parents and families are we attracting? What kind of parents and families do we *want* to attract? **If** our audience isn't as interested in a high-performing school, then this may all be moot. But I say, let's have some cake and eat it too! I think we can offer a superb "customer service" experience (strong community, lots of diversity) *and* have strong academics on top of that. I'd love to see our school doing that in 5 years.

In 5 years, I would feel so proud to be able to say something like, "90% of our 8th grade graduates go on to take AP classes in high school," or "100% of our graduates go on to successfully graduate from high school," or "90% of our 8th grade graduates get accepted to a college or university." I believe in the Montessori approach wholeheartedly, and I think that we have so much to offer, but for some reason the academics are not showing in our test taking. I'd like our school to be able to have some sweet stats to show off to the community how amazing we are. We need to figure out how to align our approach to *demonstrating* our academic capacities in the same ways other schools do – primarily through state testing. Within 5 years, I would like to be able to successfully figure out how to showcase our academics in the same or similar ways as other schools. It may be through test scores, or it may be in other statistical ways.

1st/2nd/3rd -Marlo Knox

This board report is written to answer the prompt our director shared with us; How would you like to see Sherwood in five years? My first thought was, I'd like Sherwood to continue exactly as it is, small, snuggled into plenty of green space, serving people who agree to approaching learning as Maria Montessori approached learning knowing it is completely different than most traditional school settings.

Thinking a little longer on the subject I determined that I could be more specific, I could dream about the ideals, I could imagine, even pick at the nuts and bolts. When I invest time in reflecting on my professional future and the future of Sherwood I focus on growth. I'm not worried about the rough parts, the places I/we can improve. That being said, I want to learn from those struggles and make improvements and continue learning so that I am not facing the same struggles year after year after year.

I began my work at Sherwood in the 2013/2014 school year. Unfortunately, we have not learned how to find the right people and keep them. In five years, I would like to see that resolved. I think it will mean being brutal about defining who is the right person and why. Admitting the fact that any person, or the only person available, may not do. Competitive salaries and incentives for years of successful service should be considered even though a lot of work has been done already in that area.

We have had some all-school celebrations in regards to behavior. In five years could we have all-school assemblies on a regular basis with protocols for being together that would lap over and into school wide events. This is especially possible if we intentionally stay small and solve our staffing issue.

In five years could we define what "child-focused" and "self-motivated growth" means to us. Does a child performing at grade level have different rights and responsibilities considering their own personal focus and motivation compared to a student who is struggling academically?

Finally, in five years can we make it back to a three-hour, uninterrupted work period considering our post COVID selves, intervention schedules, and wellness needs? If not, how are we going to make our Montessori practice work? Can we try some drastic steps and reflect on them? Examples of drastic steps might be volunteer supervised snacks for each class so teachers can keep teaching. Does intervention have to be pushed in or do assistants have to be trained to deliver intervention in classrooms? This idea takes us back to staffing. Whenever we talk about training which is expensive and takes time then we better be thinking of keeping those folks around. If we aren't going to train or it is too expensive, we better ask ourselves why we have them at all. What do we expect of a paraprofessional if they are not well trained?

I think the above sheds some light on my opinions and thoughts. I am open to discussing this topic further with any community member. And as always, I like to take these board report moments to say thank you. I am grateful to the board members for serving and even more grateful to have work I cherish and enjoy.

1st/2nd /3rd -Anne Adams

In five years, I imagine a Sherwood with a more harmonious and enriched school culture, and a great reputation as a place for whole-child development and academic rigor.
This vision is only possible if there's enough stability in our staffing and student roster year after year. If we keep working with the same people for longer, we can make more progress. :)

Obviously there's much more to consider and say, but these are the big ideas I have for this topic.

4th /5th/6th -Jessi Lusardi

In the next five years, I would like to see Sherwood enrollment grow. It would be great if classes were between 15-20 students each. I know there have been some solutions to growing our enrollment that have already been looked into, and I think it would be even better if we could have an enrollment committee or group, made up of teachers and admin that could address more or different solutions.

What sets Sherwood apart from other schools, and draws parents to enroll their students here? Is it just that we are a Montessori school with small class sizes? I think we have enough talent in our teachers and staff to add another emphasis, such as music or environmental education. Most of my background is in environmental ed, and I have seen schools and districts that have organized and funded a dedicated outdoor/environmental ed program from the Kinder through 8th grade levels, however music seems to be a huge interest for our students as well. Just some food for thought.

Thank you for listening!

4th /5th /6th-April Pearce

7th/8th-Michael Whittemore

Learning Center-Happy Yasko

I would like to see Sherwood as a leader in academics amongst schools in this area. I would like us to be the example for what education should be. I would want Sherwood to take a serious look at itself and be able to see the areas that need overhauling. I would like to see us being more proactive as opposed to reactive in addressing things that hinder our goals and our mission statement. We should be able to do more than just handle all diversities of students, including those with learning disabilities, but also help them flourish in their educational journey. I would like to see a well-trained staff excelling in the art of cooperation. The problems that surface need to become all of our problems and should have an immediate response. I would like to see more time spent in teaching students the kinds of enrichment that they are passionate about. (Cooking, gardening, science experiments, arts, music, drama to name a few). I would like to see the evolution of how certain subjects are taught to promote more enthusiastic participation from all students. I would hope we would have a system in place that the students would know "oh too well" concerning what expectations we have for them, and ones that explain what their expectations from us should be. Are these reasonable expectations? I am not sure, but I have always aimed high.

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **School Director Report**

Date: February 16, 2023

Administrative

- Updated enrollment will be reported at the meeting.
- Sherwood has been identified for Additional Targeted Support and Improvement because our low-income students tested very low in ELA and math and we are a Title 1 school.
- I attended a workshop presented by the CCSA (California Charter School Association) titled: *NorCal & Central Valley Renewal Cohort Workshops-Legal Tips* to prepare for our Charter renewal next year. We are on track for a smooth renewal.

Employees, Interns, and Independent Contractors

- We are currently seeking a new Extended Day Aide to cover Sarah Kane. Sarah has accepted a full-time position as a Camp Director.
- Zack Genaro Cerullo was hired for our previous opening in Extended Day. Anneke Kerr, a Sherwood graduate, will also join our Extended Day team.
- We are currently interviewing for a 1:1 Aide position.
- We have interviewed three substitute teachers and are in the process of contacting their references. We continue to have a high need for substitute teachers and classified staff.

Community

- Butte Environmental Council (BEC) will be planting trees on our main campus near the garden and at 1010. We'll be getting shade trees and apple trees as part of a grant BEC was awarded to plant trees in the community.

Safety

- We had a brief (six minute) code red as a precaution while Chico PD conducted a felony arrest. The timing was difficult as it was during dismissal with parents and siblings out of classrooms, in cars, and still in classrooms.

SHERWOOD MONTESSORI

To: Board of Directors

From: Pat Casey, Business Manager

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

Date: February 16, 2023 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 January 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 641,459.55 as of January 31, 2023 for the checking account.
- The expenses in January were for the normal operating cost.

Profit & Loss

- The January Profit & Loss report shows a Net Income of $ -99,653, which will be offset by January LCF funds deposited in February 2023 along with any State/Fed Grant funds.

Cash Flow

- Assuming all Federally allocated funds are received and state aid is calculated on an Annual ADA of at least 100, the school is projected to end the year with a positive cash balance.

Sherwood Montessori
Profit & Loss YTD Comparison
July 2022 through June 2023

	Jul '22 - Jun 23
Ordinary Income/Expense	
Income	
8000-Revenues	
8010-8099 Revenue Limit Sources	557,771
8110-8290 Federal Revenues	159,164
8300-8599 Other State Revenue	
8311 - AB602 Spec. Educ.- SELPA	63,189
8312 - ERMHS LVL1	965
8312 - ERMHSLvl2	914
8550 - Mandate Block Grant	1,861
8560-State Lottery Revenue	6,169
8590-Categorical Funds	
8590 - LREBG - 7435	106,137
Educator Effectiveness	8,987
ELOP - 2600	54,280
PRE-K PLAN-IMPLEMENT	29,108
Total 8590-Categorical Funds	198,512
Total 8300-8599 Other State Revenue	271,609
8600-8799 Other Local Revenue	28,548
Total 8000-Revenues	1,017,092
Total Income	1,017,092
Gross Profit	1,017,092
Expense	
1000 Certificated Salaries	396,607
2000 Classified Salaries	264,955
3000-Employee Benefits	210,407
4000-Books and Supplies	38,049
5000 Services/Other Op. Exp.	206,728
Total Expense	1,116,745
Net Ordinary Income	-99,653
Net Income	**-99,653**

Sherwood Montessori
Board of Directors - Vendor Payments Report
January 2023

Type	Date	Num	Name	Memo	Account	Amount
Check	01/03/2023	DBT	Facebook Ads	AD - RM	Advertising	134.99
Check	01/03/2023	9609	Angelina Bushnell	HATS-NECKLACES	LiveScan and TB Test S...	29.59
Check	01/03/2023	9610	Steve Duke	INV 12-21-22 TECHNIC...	Contracted Service	150.00
Check	01/03/2023	ACH	Macquarie Equip...	Kyocera Copier Lease 2...	Copier Lease	220.94
Check	01/03/2023	DBT	Indeed	Ad for job position	Advertising	78.00
Check	01/10/2023	DBT	Amazon.com	FINN FAMILY MOOMIN...	4200-Books/reference M...	8.57
Check	01/10/2023	DBT	Learning A-Z	RAZ-PLUS READING A-...	Software Licensing	362.00
Check	01/10/2023	DBT	University Box Of...	MARLO 123M	Field Trips and Assembl...	458.00
Check	01/10/2023	EFT	CharterSAFE	BILLED PREMIUM - LIA...	5400-Liability Insurance	3,000.00
Check	01/10/2023	EFT	CharterSAFE	BILLED PREMIUM - WC...	3601-Workers Comp	748.00
Check	01/10/2023	DBT	Amazon.com	COMET IN MOOMINLA...	4200-Books/reference M...	8.03
Check	01/10/2023	DBT	Amazon.com	COMET IN MOOMINLA...	4200-Books/reference M...	8.03
Check	01/10/2023	DBT	Amazon.com	COMET IN MOOMINLA...	4200-Books/reference M...	8.03
Check	01/10/2023	DBT	Amazon.com	FINN FAMILY MOOMIN...	4200-Books/reference M...	8.57
Check	01/10/2023	DBT	Amazon.com	COMET IN MOOMINLA...	4200-Books/reference M...	8.03
Check	01/10/2023	DBT	Amazon.com	COMET IN MOOMINLA...	4200-Books/reference M...	8.03
Check	01/10/2023	dbt	Amazon.com	books	Instructional Supplies	74.86
Check	01/11/2023	DBT	Amazon.com	INDEX CARDS	Instructional Supplies	11.68
Check	01/11/2023	DBT	Office Depot	SUPPLIES	Office Supplies	260.53
Check	01/11/2023	DBT	Costco	OFFICE SUPPLIES	Office Supplies	152.70
Check	01/11/2023	9611	Advanced Docu...	INV89966	Copier Lease	450.66
Check	01/11/2023	9612	Hernandez Clean...	INV 0136 HOURS - DES...	Contracted Service	400.00
Check	01/11/2023	9613	Hernandez Clean...	CUSTODIAL SERVICE ...	Contracted Service	4,500.00
Check	01/11/2023	EFT	Comcast 4454	SERVICE - 2023 DEC-J...	Internet Service Provider	243.89
Check	01/11/2023	EFT	California Water ...	SERVICE 2022 NOV-DEC	Water	46.33
Check	01/11/2023	EFT	Vanessa Aripez	SPRAY PAINT	Office Supplies	14.97
Check	01/11/2023	DBT	Costco	SNACKS	Extended Day	206.01
Check	01/11/2023	DBT	Amazon.com	COMET IN MOOMINLA...	4200-Books/reference M...	8.03
Check	01/11/2023	DBT	Amazon.com	KEYBOARD STAND	Office Supplies	26.34
Check	01/11/2023	DBT	Amazon.com	COMET IN MOOMINLA...	4200-Books/reference M...	8.03
Check	01/12/2023	DBT	Amazon.com	REPTILE LIGHT	Instructional Supplies	38.58
Check	01/13/2023	ACH	COSTCO VISA C...	2022 15TH PURCHASE...	SHERWOOD COSTCO ...	2,531.79
Check	01/13/2023	9614	UPGRADED LIVI...	AD IN GROWING UP C...	Advertising	200.00
Check	01/13/2023	9616	Maia Illa, LCSW	Supervision-Swanson IN...	Contracted Service	320.00
Pay...	01/13/2023	11380	BLUE OAK CHA...		9200-Accounts Receiva...	-3,819.70
Check	01/15/2023	DBT	Amazon.com	INDEX CARDS - DESK ...	Office Supplies	27.59
Check	01/17/2023	DBT	Amazon.com	COMET IN MOOMINLA...	4200-Books/reference M...	8.03
Check	01/17/2023	DBT	Wufoo	SERVICE 2023 JAN - 2...	Online List Management	19.00
Check	01/18/2023	9615	Comcast Ethernet	Service-2742 2022 DEC	Ethernet - Fiberoptic	2,594.61
Check	01/18/2023	EFT	PG & E	DEC 22 - JAN 23	Electricity	711.42
Check	01/18/2023	EFT	Waste Managem...	SERVICE 2022 DEC	Trash/Recycling	133.76
Check	01/18/2023	DBT	Amazon.com	CRAYOLA CHALK	Instructional Supplies	2.13
Check	01/19/2023	DBT	HP LEASE 7603	Lease Payment - Custo...	HP DIRECT LEASE	316.21
Check	01/19/2023	EFT	Pat H. Casey	Annual Fee	Intuit Payroll Service	650.00
Check	01/19/2023	DBT	Amazon.com	PERMANENT MARKERS	Instructional Supplies	9.62
Check	01/19/2023	DBT	Office Depot	TAPE-CARD STOCK	Office Supplies	106.12
Check	01/19/2023	DBT	University Box Of...	TKKT THERESA	Field Trips and Assembl...	128.00
Check	01/19/2023	DBT	PANERA BREAD	UE PBIS	Food - Meetings	58.01
Check	01/19/2023	DBT	Home Depot	BANBO FENCING	Maintenance Supplies	203.73
Pay...	01/20/2023	11388	BLUE OAK CHA...		9200-Accounts Receiva...	-3,819.70
Check	01/21/2023	DBT	Amazon.com	SWINGLINE STAPLES/...	Instructional Supplies	27.70
Check	01/22/2023	DBT	Amazon.com	KEYBOARD DRAWER	Office Supplies	69.70
Check	01/23/2023	9607	Chico Country Day	NATALIE WREN - NUR...	Contracted Service	1,291.91
Check	01/23/2023	DBT	Amazon.com	KEYBOARD DRAWER	Office Supplies	69.70
Check	01/23/2023	DBT	Amazon.com	SPELLING BEE TOOLB...	4200-Books/reference M...	26.76
Check	01/23/2023	DBT	Amazon.com	JAN MEMBERSHIP FEE	Office Supplies	16.08
Check	01/23/2023	DBT	Amazon.com	KEYBOARD DRAWER	Office Supplies	69.70
Check	01/24/2023	DBT	USPS	STAMPS	Postage	63.00
Check	01/24/2023	DBT	Costco	SNACKS-SUPPLIES	Extended Day	404.72
Check	01/25/2023	DBT	Home Depot	BOW RAKE - LCAP	LCAP	28.94
Check	01/26/2023	9619	Carly DeMartini	ADAPTIVE PE - Indepen...	SELPA	620.00
Check	01/26/2023	9620	PARK AVENUE ...	INV 587522	Pest Control	85.00
Check	01/26/2023	EFT	Comcast Busines...	SERVICE 2023 JAN	Internet Service Provider	187.87

Type	Date	Num	Name	Memo	Account	Amount
Check	01/26/2023	9621	CUSD	2022 FUA - INV 23-0010...	CUSD FUA Charges	2,396.14
Check	01/26/2023	DBT	Amazon.com	HUNDRED BOARD	Instructional Supplies	35.38
Check	01/26/2023	DBT	Amazon.com	PYTHAGORAS BOARD	Instructional Supplies	40.74
Check	01/26/2023	DBT	Verizon Wireless	PAID ONLINE - SERVIC...	Telephone, Cellular	93.56
Check	01/30/2023	DBT	Amazon.com	KINETIC SAND	Instructional Supplies	18.11
Check	01/30/2023	DBT	Amazon.com	STAPLES	Instructional Supplies	14.66
Check	01/31/2023	7432	Nick Gorgani, DD...	Nora Horvath-Rudov pat...	3903-Other Employee B...	332.00
Check	01/31/2023	DBT	Target	POWER STRIP - CLEA...	Instructional Supplies	26.15
Bill	01/31/2023	2022/...	Pat Casey	CONTRACT SERVICE - ...	Business Manager Servi...	4,400.00
Check	01/31/2023			Service Charge	Bank Fees	27.00
TOTAL						**22,406.86**

Sherwood Montessori
Board of Directors - Donations and Fundraising Report
January 2023

Type	Date	Memo	Amount
8000-Revenues			
8600-8799 Other Local Revenue			
8699-Fundraising and Donations			
8699-Fundraising			
Deposit	01/13/2023	WINTER FESTIVAL	1,200
Total 8699-Fundraising			1,200
Total 8699-Fundraising and Donations			1,200
Total 8600-8799 Other Local Revenue			1,200
Total 8000-Revenues			1,200
TOTAL			**1,200**

SHERWOOD MONTESSORI

MEMORANDUM

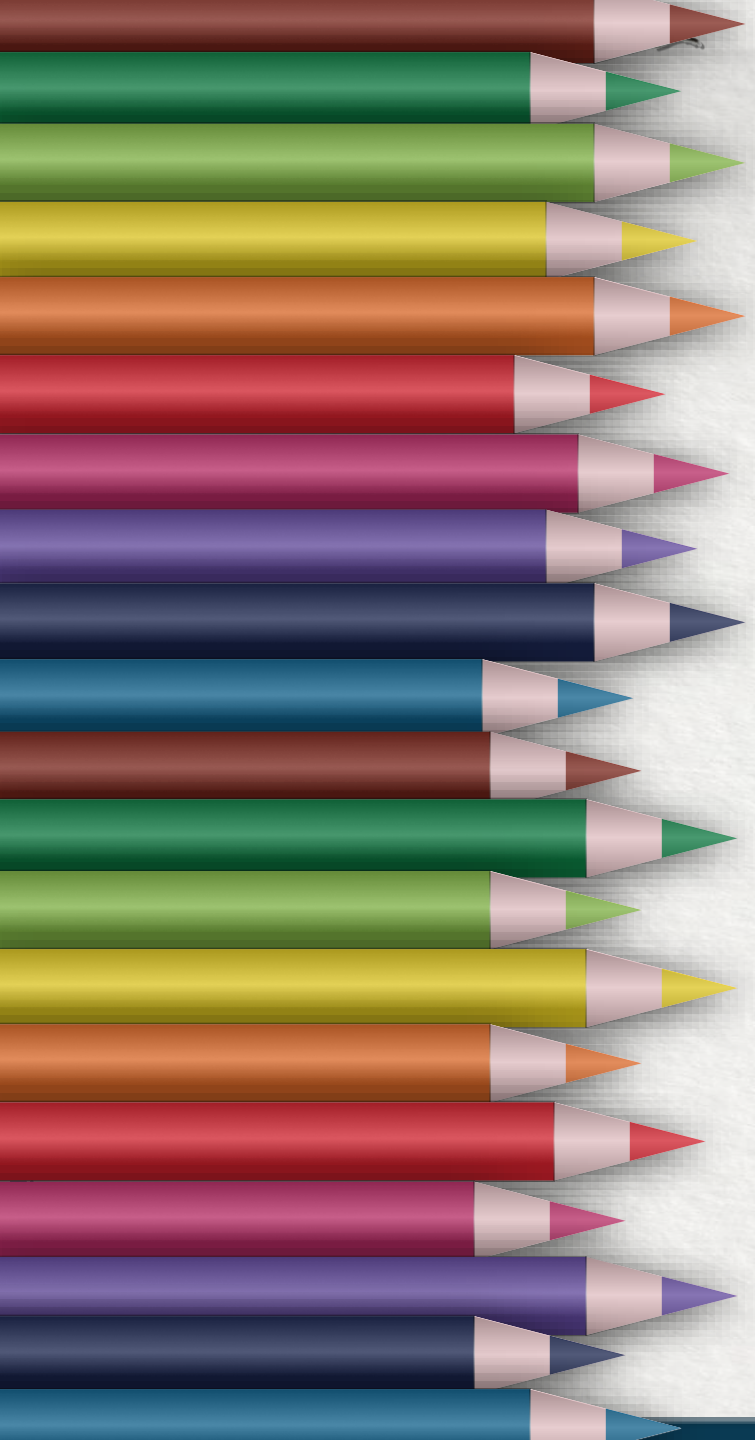
To: Board of Directors

From: Heather Fisher, Administrative Assistant

Subject: **SMPO Report**

Date: February 16, 2023

This month the SMPO Team decided to reschedule our annual Winter Wonderland Family Ball. In the past, the Family Ball has been held on the 1010 campus. This year, due to the changes in classroom configurations and the addition of TK/K classes to the 1010 campus, it was determined that the event would have to be held off campus. The Dorothy Johnson Center was suggested and unavailable for the dates we wanted. Fortunately, we have decided to reschedule the Family Ball for the Spring and are in the process of securing the date and time. In the meantime, the SMPO Team has been instrumental in the promotion of our Cal Skate Skating Party on February 16th. Cal Skate will be ours for an evening! This is a super fun annual event, and we are looking forward to it!



Sherwood's Dashboard

Town Hall Meeting February 7, 2023

Outcomes

- Awareness of Sherwood's Dashboard Data
- Engage in identifying successes, challenge areas, trends and possible outliers
- Understanding of our school's LCAP Goals & Actions
- Opportunity to provide feedback:
  - Actions that are supporting my student
  - Possible barriers to my student's growth

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LOCAL CONTROL FUNDING FORMULA (LCFF) BASICS



Per student base grant

+





Grade span Adjustments

+







Add-on adjustments based on the number and concentration of low income, EL, and foster youth students

— Absences

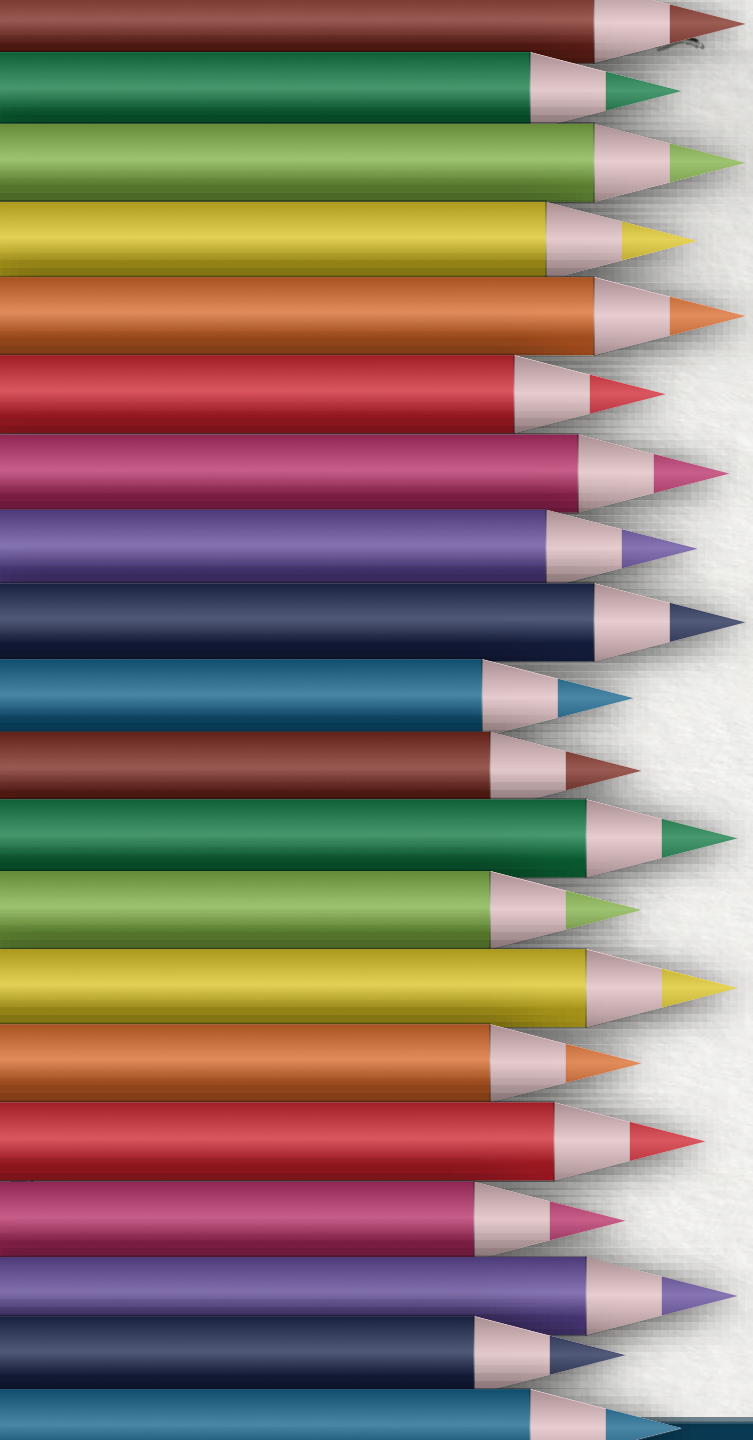
= $

Dashboard Data

How did we do?

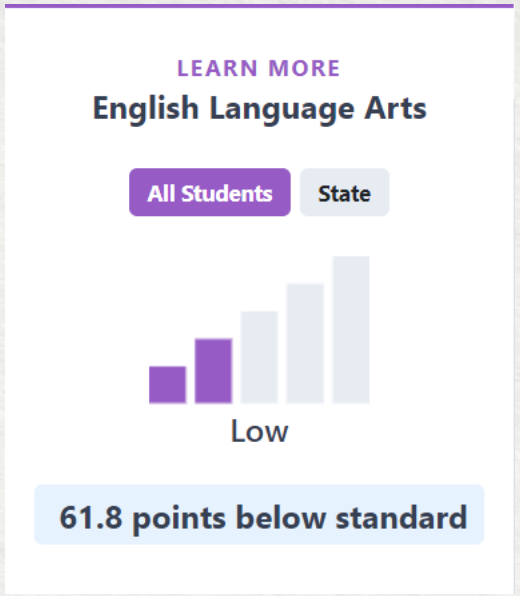


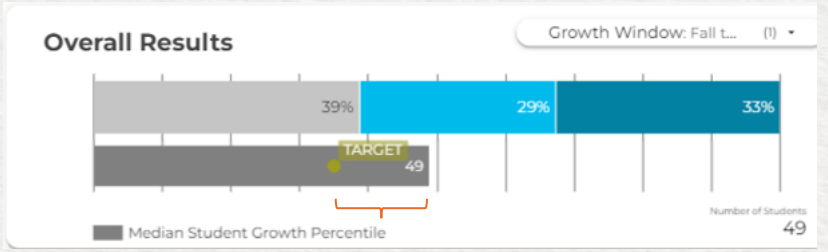
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Academic Data

English Language Arts



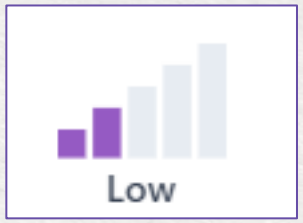


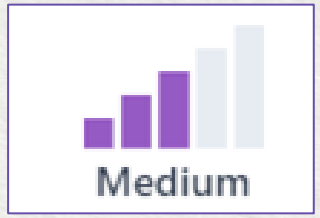
The average student growth percentile exceeded the target for a year's growth.

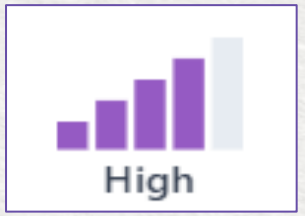
The Dashboard shows an average of *all* students in grades 3-8 end of the year summative standardized test results, including those students taking the alternative assessment. The second graph shows the students average growth rate in reading from the same age group. Our students exceeded a year's growth.

English Language Arts











- Low Income

Because Sherwood is a small school (we had only 49 students in the grades that are tested who took the test), the only significant subgroup we have is low income. Low income students as a whole performed in the Very Low range for ELA. A subgroup must have at least 30 to show up on the dashboard. Other groups that are smaller than 30 appear under “No Performance Level”.

No Performance Level

African American

American Indian

Asian

English Learners

Foster Youth

Hispanic

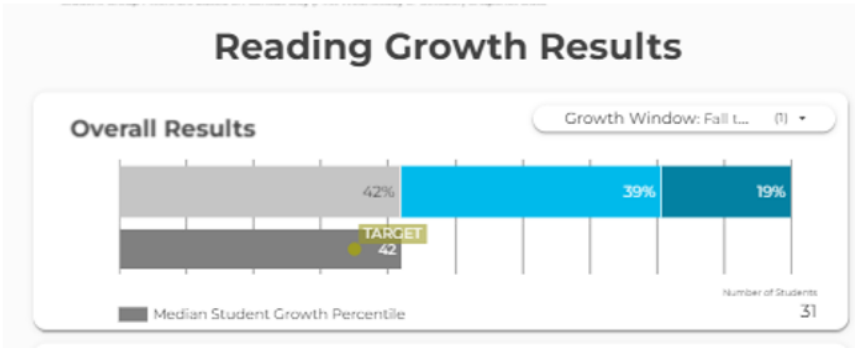
Homeless

Two or More Races

Students with Disabilities

White

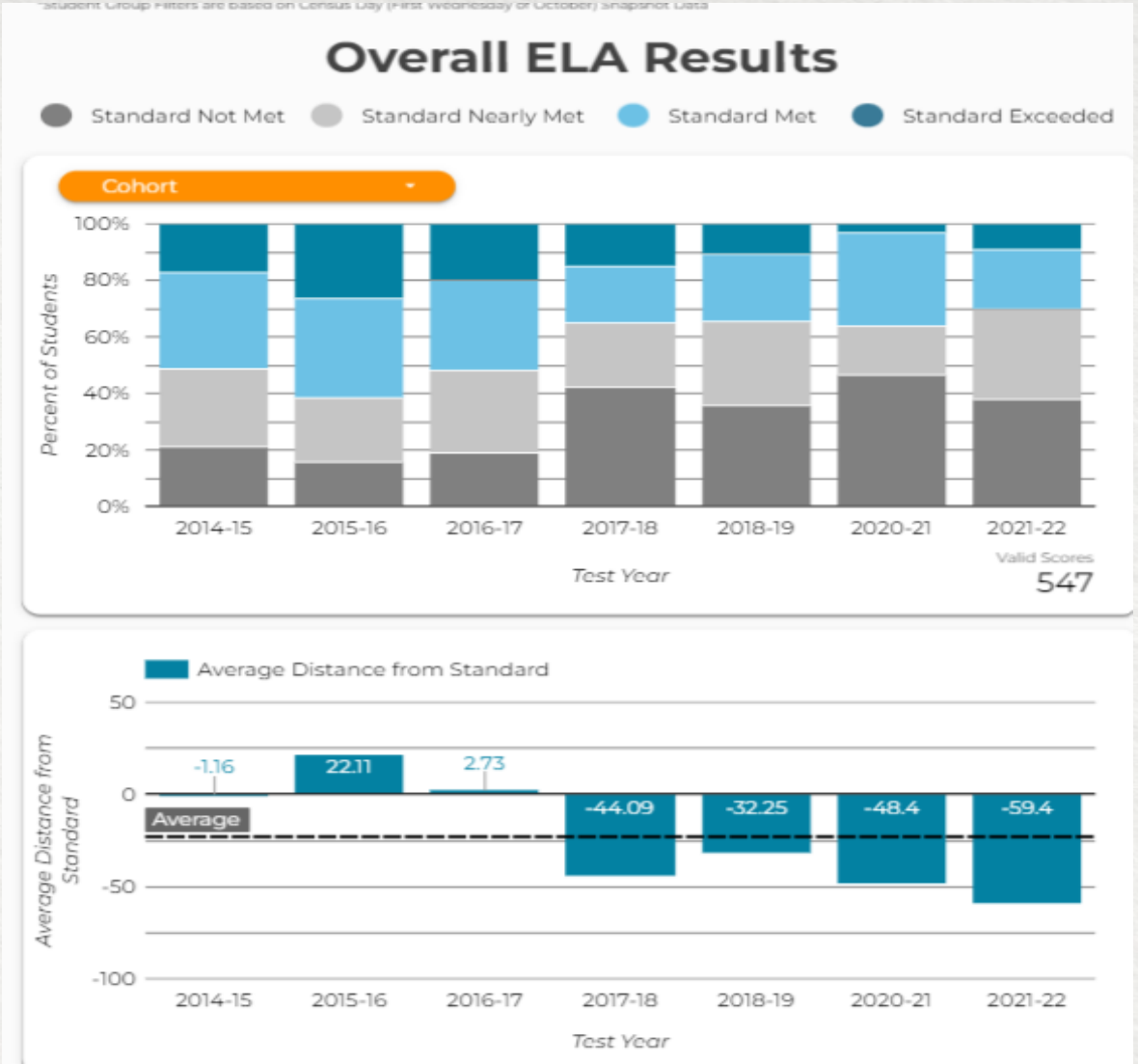
Students in the Low Income group did exceed the one year’s growth target for reading, but ultimately still performed “Very Low” on the end-of-the year standardized test.



Economically Disadvantaged Students’ Growth

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ELA CAASPP Data Over Time



slidesmania.com

Mathematics

LEARN MORE

Mathematics

All Students | State

Very Low

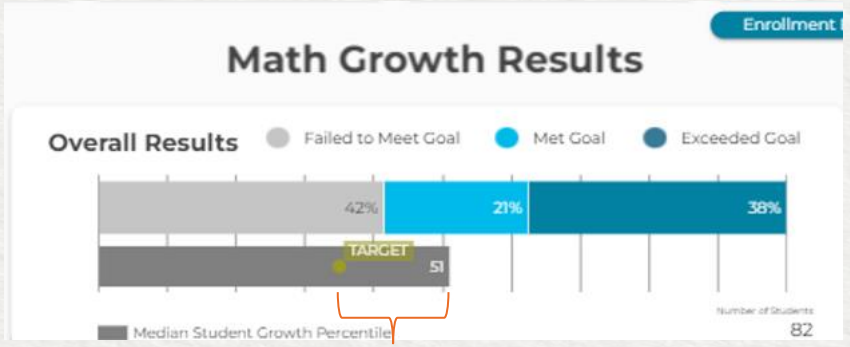
100.2 points below standard

EQUITY REPORT

Number of Student Groups in Each Level

1	0	0	0	0
Very Low	Low	Medium	High	Very High

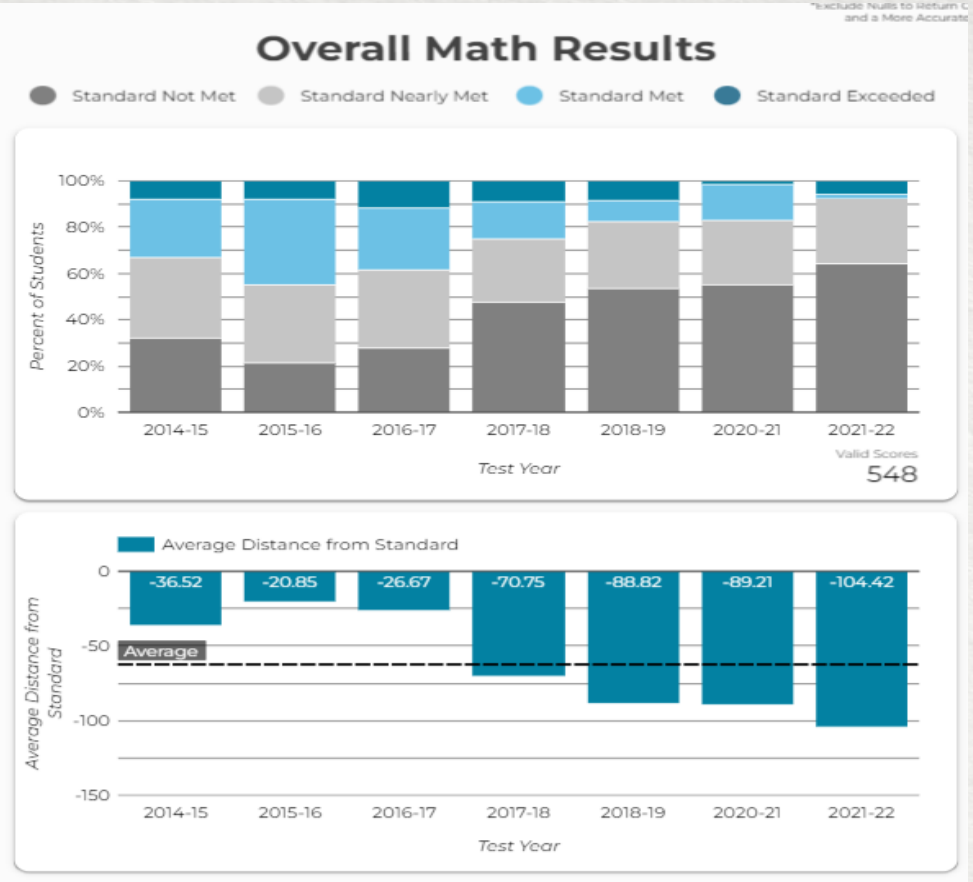
View More Details →



As with ELA, the average student growth percentile in math exceeded the target for a year's growth.

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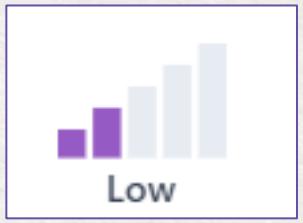
Math CAASPP Data Over Time

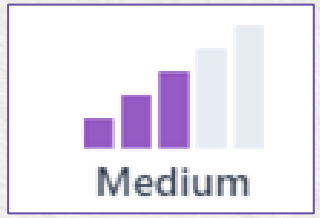


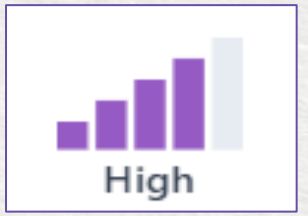
slidesmania.com

Mathematics











- All Students
- Low Income

No Performance Level

African American

American Indian

Asian

English Learners

Foster Youth

Hispanic

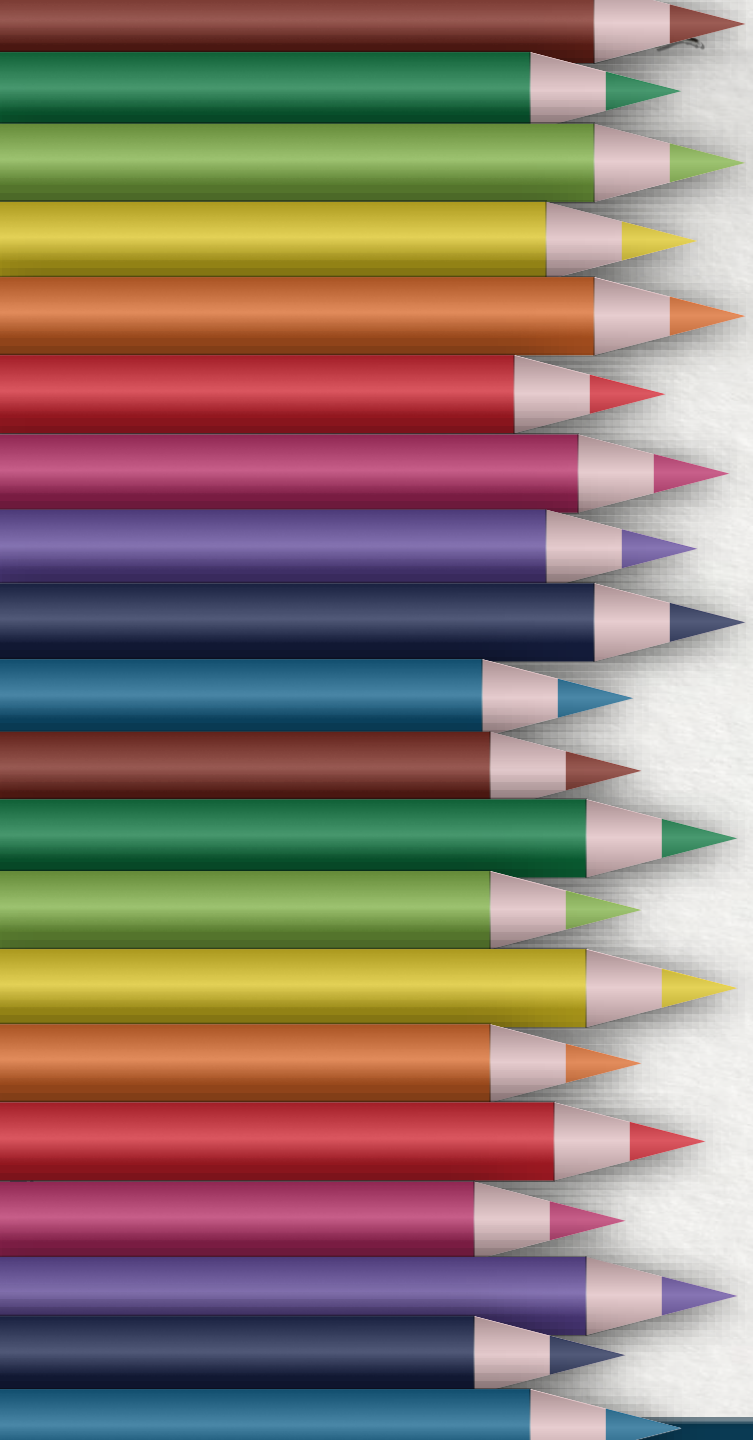
Homeless

Two or More Races

Students with Disabilities

White

slidesmania.com



School Climate & Engagement Data

Suspension Rate

All Students

All Students | State



Medium

3% suspended at least one day

Number of Students: 133

No Performance Level

African American
American Indian
Asian
English Learners
Foster Youth
Hispanic
Homeless
Two or More Races
Students with Disabilities

slidesmania.com

Suspension Rate



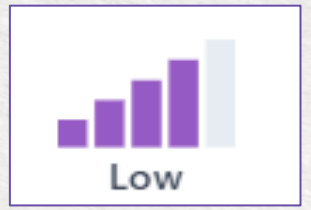
- No Students



- Low Income



- White



- No Students



- No Students

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Chronic Absenteeism

All Students

All Students | State



Very High

34.9% chronically absent

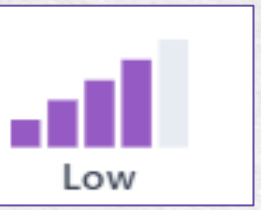
Number of Students: 126

No Performance Level

African American
American Indian
Asian
English Learners
Foster Youth
Hispanic
Homeless
Two or More Races
Students with Disabilities

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Chronic Absenteeism

Very High	High	Medium	Low	Very Low
				
• White • Low Income	• No Students	No Students	No Students	No Students

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Questions:

What actions & supports do you believe has been **most beneficial** in creating a safe and supportive environment ?

Which of the actions made a positive difference for your child and how?

Was your student unable to take advantage of some of these supports? Why?

Any recommendations for improvement for us to consider?

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michelle@sherwoodmontessori.org

(530) 345-6600

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SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Arts, Music, and Instructional Materials (AMIM) Discretionary Block Grant.**

Date: February 16, 2023

SUMMARY

Each California school receiving AMIM funds is required to have its plan for use of the funds discussed in a public meeting and adopted by its governing body.

DISCUSSION

From the CDE website:

AMIM Grant funds are allocated to LEAs for five purposes enumerated in Section 134(a) of Chapter 2 of the Statutes of 2022, as amended by Section 56 of AB 185, which may be briefly summarized as: (1) obtaining standards-aligned professional development and instructional materials for specified subject areas; (2) obtaining professional development and instructional materials for improving school climate; (3) developing diverse, culturally relevant and multilingual school library book collections; (4) operational costs, including retirement and health care cost increases; and (5) COVID-19-related costs necessary to keep pupils and staff safe and schools open for in-person instruction.

Although there are many allowable uses for these one-time funds that are more appealing, this is the only money guaranteed for use for the increasing costs of retirement and health care costs facing California schools. If we approve use of these funds for this expenditure only, it still will not cover the increased costs through the end of the allowable time to use them. These are also “one-time” funds, which means any arts or music programming that is started with these funds will run out of money. It is makes more sense to start arts and music programming with the Prop. 28 funding, which voters supported and will not be taken away by the legislature.

The recommendation is to adopt a plan to use AMIM funds for the increased operational costs in retirement and health care.

ACTION REQUESTED: Adopt plan for AMIM funds.

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **School Accountability Report Card**

Date: February 16, 2023

SUMMARY

Each year, the School Director is required to complete a School Accountability Report Card (SARC) in accordance with state law for the prior year. The report follows an approved template that comes pre-populted with data from the CDE and is then posted on our website and on the CDE website.

DISCUSSION

The SARC includes data on enrollment demographics, facilities, learning materials, school spending, teacher credentials and professional development. All information in the report is public information. The Board may wish to offer suggestions for revision.

More information and links copied/pasted from the SARC template:

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, see the California Department of Education (CDE) SARC Web page at http://www.cde.ca.gov/ta/ac/sa/.

- For more information about the LCFF or LCAP, see the CDE LCFF Web page at http://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.

ACTION REQUESTED

Approve report.

Sherwood Montessori

2021-2022 School Accountability Report Card
(Published During the 2022-2023 School Year)

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 https://www.cde.ca.gov/ta/ac/sa/

For more information about the LCFF or the LCAP, see the CDE LCFF web page at https://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 https://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) https://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.

2022-23 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

2022-23 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

2022-23 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 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 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

2021-22 Student Enrollment by Grade Level

Grade Level	Number of Students
Kindergarten	10
Grade 1	18
Grade 2	21
Grade 3	12
Grade 4	12
Grade 5	14
Grade 6	10
Grade 7	2
Grade 8	6
Total Enrollment	105

2021-22 Student Enrollment by Student Group

Student Group	Percent of Total Enrollment
Female	40.0
Male	60.0
American Indian or Alaska Native	1.9
Asian	4.8
Black or African American	3.8
Filipino	0.0
Hispanic or Latino	20.0
Native Hawaiian or Pacific Islander	0.0
Two or More Races	13.3
White	56.2
English Learners	6.7
Foster Youth	2.9
Homeless	9.5
Migrant	0.0
Socioeconomically Disadvantaged	58.1
Students with Disabilities	16.2

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

2020-21 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)	6.40	81.23	588.00	84.35	228366.10	83.12
Intern Credential Holders Properly Assigned	0.00	0.00	4.50	0.65	4205.90	1.53
Teachers Without Credentials and Misassignments ("ineffective" under ESSA)	1.50	18.77	12.90	1.86	11216.70	4.08
Credentialed Teachers Assigned Out-of-Field ("out-of-field" under ESSA)	0.00	0.00	53.90	7.74	12115.80	4.41
Unknown	0.00	0.00	37.60	5.39	18854.30	6.86
Total Teaching Positions	7.90	100.00	697.10	100.00	274759.10	100.00

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 based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

2021-22 Teacher Preparation and Placement

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
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						

2021-22 data was not included as part of the initial release of data on 1/13/23. The CDE has indicated that the data will be available after the 2/1/23 SARC deadline. The data will be populated when it is published by the CDE.

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 based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

Teachers Without Credentials and Misassignments (considered "ineffective" under ESSA)

Authorization/Assignment	2020-21	2021-22
Permits and Waivers	0.00	
Misassignments	1.50	
Vacant Positions	0.00	
Total Teachers Without Credentials and Misassignments	1.50	

2021-22 data was not included as part of the initial release of data on 1/13/23. The CDE has indicated that the data will be available after the 2/1/23 SARC deadline. The data will be populated when it is published by the CDE.

Credentialed Teachers Assigned Out-of-Field (considered "out-of-field" under ESSA)

Indicator	2020-21	2021-22
Credentialed Teachers Authorized on a Permit or Waiver	0.00	
Local Assignment Options	0.00	
Total Out-of-Field Teachers	0.00	

2021-22 data was not included as part of the initial release of data on 1/13/23. The CDE has indicated that the data will be available after the 2/1/23 SARC deadline. The data will be populated when it is published by the CDE.

2021-22 Class Assignments

Indicator	2020-21	2021-22
Misassignments for English Learners (a percentage of all the classes with English learners taught by teachers that are misassigned)	60.00	
No credential, permit or authorization to teach (a percentage of all the classes taught by teachers with no record of an authorization to teach)	0.00	

2021-22 data was not included as part of the initial release of data on 1/13/23. The CDE has indicated that the data will be available after the 2/1/23 SARC deadline. The data will be populated when it is published by the CDE.

Note: For more information refer to the Updated Teacher Equity Definitions web page at https://www.cde.ca.gov/pd/ee/teacherequitydefinitions.asp.

2022-23 Quality, Currency, Availability of Textbooks and Other Instructional Materials

Year and month in which the data were collected	January 2023

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 Reading A to Z Montessori Reading Pathways	Yes	0.0
Mathematics	Traditional Montessori materials Go Math grades 4-6 California College Preparatory Mathematics (CPM) grades 6-8 IXL grades 1-6	Yes	0.0
Science	Traditional Montessori Materials The California Education and the Environment Initiative (EEI) Curriculum grades 4-6 Waseca Biomes Curriculum grades 1-3 TCI grades 7-8	Yes	0.0
History-Social Science	Traditional Montessori Materials TCI grades 7-8	Yes	0.0
Foreign Language	Spanish materials, dictionaries & Duolingo application	Yes	0.0
Health	Traditional Montessori Materials TCI Science	Yes	0.0
Visual and Performing Arts	Montessori Arts Curriculum	Yes	0.0

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 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 two classrooms and a library/teaching kitchen at the 1010 site. The two classrooms house our transitional kindergarten/kindergarten program with an outdoor area designed for young children.

Year and month of the most recent FIT report	1/2023

System Inspected	Rate Good	Rate Fair	Rate Poor	Repair Needed and Action Taken or Planned
Systems: Gas Leaks, Mechanical/HVAC, Sewer	X			
Interior: Interior Surfaces	X			
Cleanliness: Overall Cleanliness, Pest/Vermin Infestation	X			
Electrical	X			
Restrooms/Fountains: Restrooms, Sinks/ Fountains	X			
Safety: Fire Safety, Hazardous Materials	X			
Structural: Structural Damage, Roofs	X			
External:	X			

School Facility Conditions and Planned Improvements

Playground/School Grounds, Windows/ Doors/Gates/Fences				

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).
4. **College and Career Ready**
   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.

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 2020-21 data cells have N/A values because these data are not comparable to other year data due to the COVID-19 pandemic during the 2020-21 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 2020-21 data between school years for the school, district, state are not an accurate comparison. As such, it is inappropriate to compare results of the 2020-21 school year to other school years.

Percentages are not calculated when the number of students tested is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

ELA and mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The "Percent Met or Exceeded" is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3-Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Subject	School 2020-21	School 2021-22	District 2020-21	District 2021-22	State 2020-21	State 2021-22
English Language Arts/Literacy (grades 3-8 and 11)	N/A	30	N/A	55	N/A	47
Mathematics (grades 3-8 and 11)	N/A	9	N/A	39	N/A	33

2021-22 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.

ELA test results include the Smarter Balanced Summative Assessment and the CAA. The "Percent Met or Exceeded" is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3-Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Double dashes (--) appear in the table when the number of students is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

CAASPP Student Groups	CAASPP Total Enrollment	CAASPP Number Tested	CAASPP Percent Tested	CAASPP Percent Not Tested	CAASPP Percent Met or Exceeded
All Students	56	54	96.43	3.57	29.63
Female	24	24	100.00	0.00	29.17
Male	32	30	93.75	6.25	30.00
American Indian or Alaska Native	--	--	--	--	--
Asian	--	--	--	--	--
Black or African American	--	--	--	--	--
Filipino	0	0	0.00	0.00	0.00
Hispanic or Latino	15	15	100.00	0.00	40.00
Native Hawaiian or Pacific Islander	0	0	0.00	0.00	0.00
Two or More Races	--	--	--	--	--
White	24	24	100.00	0.00	20.83
English Learners	--	--	--	--	--
Foster Youth	--	--	--	--	--
Homeless	--	--	--	--	--
Military	0	0	0.00	0.00	0.00
Socioeconomically Disadvantaged	37	37	100.00	0.00	21.62
Students Receiving Migrant Education Services	0	0	0.00	0.00	0.00
Students with Disabilities	17	17	100.00	0.00	11.76

2021-22 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.

Mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The "Percent Met or Exceeded" is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3-Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Double dashes (--) appear in the table when the number of students is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

CAASPP Student Groups	CAASPP Total Enrollment	CAASPP Number Tested	CAASPP Percent Tested	CAASPP Percent Not Tested	CAASPP Percent Met or Exceeded
All Students	56	54	96.43	3.57	9.26
Female	24	24	100.00	0.00	4.17
Male	32	30	93.75	6.25	13.33
American Indian or Alaska Native	--	--	--	--	--
Asian	--	--	--	--	--
Black or African American	--	--	--	--	--
Filipino	0	0	0.00	0.00	0.00
Hispanic or Latino	15	15	100.00	0.00	6.67
Native Hawaiian or Pacific Islander	0	0	0.00	0.00	0.00
Two or More Races	--	--	--	--	--
White	24	24	100.00	0.00	8.33
English Learners	--	--	--	--	--
Foster Youth	--	--	--	--	--
Homeless	--	--	--	--	--
Military	0	0	0.00	0.00	0.00
Socioeconomically Disadvantaged	37	37	100.00	0.00	8.11
Students Receiving Migrant Education Services	0	0	0.00	0.00	0.00
Students with Disabilities	17	17	100.00	0.00	5.88

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.

For any 2020–21 data cells with N/T values indicate that this school did not test students using the CAASPP for Science.

Subject	School 2020-21	School 2021-22	District 2020-21	District 2021-22	State 2020-21	State 2021-22
Science (grades 5, 8 and high school)	28	0	0	36.99	28.5	29.47

2021-22 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. Double dashes (--) appear in the table when the number of students is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
All Students	18	18	100	0	0
Female	--	--	--	--	--
Male	--	--	--	--	--
American Indian or Alaska Native	0	0	0	0	0
Asian	0	0	0	0	0
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	--	--	--	--	--
English Learners	--	--	--	--	--
Foster Youth	--	--	--	--	--
Homeless	--	--	--	--	--
Military	0	0	0	0	0
Socioeconomically Disadvantaged	14	14	100	0	0
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.

2021-22 California Physical Fitness Test Results

This table displays the percentage of students participating in each of the five fitness components of the California Physical Fitness Test Results. Due to changes to the 2021-22 PFT administration, only participation results are required for these five fitness areas. Percentages are not calculated and double dashes (--) appear in the table when the number of students tested is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Grade Level	Component 1: Aerobic Capacity	Component 2: Abdominal Strength and Endurance	Component 3: Trunk Extensor and Strength and Flexibility	Component 4: Upper Body Strength and Endurance	Component 5: Flexibility
Grade 5	100	100	100	100	100
Grade 7					

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.

2022-23 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.

Sherwood reviews its Parent Participation Policy annually with input from parents and families. Recently the SMPO restructured with a shared leaderhip model that included a team of parents rather than the traditional elected leaders in officer positions.

2021-22 Chronic Absenteeism by Student Group

Student Group	Cumulative Enrollment	Chronic Absenteeism Eligible Enrollment	Chronic Absenteeism Count	Chronic Absenteeism Rate
All Students	133	126	44	34.9
Female	55	52	20	38.5
Male	78	74	24	32.4
American Indian or Alaska Native	2	2	0	0.0
Asian	5	5	1	20.0
Black or African American	7	7	1	14.3
Filipino	0	0	0	0.0
Hispanic or Latino	26	23	10	43.5
Native Hawaiian or Pacific Islander	0	0	0	0.0
Two or More Races	23	23	13	56.5
White	70	66	19	28.8
English Learners	7	7	2	28.6
Foster Youth	9	9	5	55.6
Homeless	13	13	9	69.2
Socioeconomically Disadvantaged	81	76	31	40.8
Students Receiving Migrant Education Services	0	0	0	0.0
Students with Disabilities	29	29	15	51.7

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 February, partial school year due to the COVID-19 pandemic. The 2019-20 suspensions and expulsions rate data are not comparable to other year data because the 2019-20 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 2019-20 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

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 2020-21	School 2021-22	District 2020-21	District 2021-22	State 2020-21	State 2021-22
Suspensions	1.45	3.01	0.67	4.01	0.20	3.17
Expulsions	0.72	0.00	0.01	0.31	0.00	0.07

2021-22 Suspensions and Expulsions by Student Group

Student Group	Suspensions Rate	Expulsions Rate
All Students	3.01	0.00
Female	1.82	0.00
Male	3.85	0.00
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	3.85	0.00
Native Hawaiian or Pacific Islander	0.00	0.00
Two or More Races	4.35	0.00
White	2.86	0.00
English Learners	0.00	0.00
Foster Youth	0.00	0.00
Homeless	15.38	0.00
Socioeconomically Disadvantaged	3.70	0.00
Students Receiving Migrant Education Services	0.00	0.00
Students with Disabilities	3.45	0.00

2022-23 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 annuallyand published 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, 2022. 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 17, 2022. 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.

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		

2021-22 Elementary Average Class Size and Class Size Distribution

This table displays the 2021-22 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	5	2		
1	6	3		
2	7	3		
3	6	2		
4	6	2		
5	7	2		
6	5	2		

2021-22 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	0

2021-22 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)	
Library Media Teacher (Librarian)	
Library Media Services Staff (Paraprofessional)	
Psychologist	0.4
Social Worker	
Nurse	0.1
Speech/Language/Hearing Specialist	0.4
Resource Specialist (non-teaching)	
Other	

2020-21 Expenditures Per Pupil and School Site Teacher Salaries

This table displays the 2020-21 expenditures per pupil and average teacher 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	$74,696
Percent Difference - School Site and District	N/A	N/A	-5.0	-55.8
State	N/A	N/A	$6,594	$88,358
Percent Difference - School Site and State	N/A	N/A	11.2	-70.9

2021-22 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 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.

2020-21 Teacher and Administrative Salaries

This table displays the 2020-21 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	$54,370
Mid-Range Teacher Salary	$66,564	$82,681
Highest Teacher Salary	$104,767	$106,610
Average Principal Salary (Elementary)	$114,404	$135,283
Average Principal Salary (Middle)	$123,945	$141,244
Average Principal Salary (High)	$126,883	$152,955
Superintendent Salary	$238,553	$264,367
Percent of Budget for Teacher Salaries	32%	33%
Percent of Budget for Administrative Salaries	4%	5%

Professional Development

Sherwood Montessori is dedicated to providing an authentic Montessori education for our diverse students. In 2020-2021 and 2021-2022 teachers and staff participated in Anti-Bias Anti-Racist (ABAR) professional development specifically for Montessori teachers; in 2022-2023 all staff participated in ABAR training from a community member that was not specific to Montessori.

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, helping students in emotional crisis to regulate, 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 attended 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. Currently the school is in its fifth year of PBIS training and implementation and has a team attending the NorCal Educational Leadership Consortium to improve support to students through humanist and restorative practices. The school was recently awarded the Phase 3 CA MTSS School grant to continue this work and become a California MTSS Pathway Certified School.

This table displays the number of school days dedicated to staff development and continuous improvement.

Subject	2020-21	2021-22	2022-23
Number of school days dedicated to Staff Development and Continuous Improvement	8	6	4

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Comprehensive School Safety Plan**

Date: February 16, 2023

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: 2023-2024 Comprehensive School Safety Plan (code language redacted for public posting)

Comprehensive School Safety Plan

2023-2024
School Year

School: Sherwood Montessori
CDS Code: 04614240121475
District: Sherwood Montessori
Address: 1010 Cleveland Ave.
Chico
Date of Adoption:
Date of Update: February 16, 2023
Date of Review:
- **with Staff**
- **with Law Enforcement**
- **with Fire Authority**

Approved by:

Name	Title	Signature	Date
Russell Shapiro	Chair, Board of Directors		
Tina Hanson-Louise	Vice Chair, Board of Directors		
Beth Hammer	Treasurer, Board of Directors		
Robyn Howley	Secretary, Board of Directors		
Jolynn Aanenson	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; Jolynn Aanenson, Member of Board of Directors

Assessment of School Safety
Sherwood operates a safe school for it's students, staff and community.

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 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 can 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.

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.

[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 pickup 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 childcare 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
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. .	Related Activities: 1) Annually review/revise Sherwood's Disaster Preparedness /Emergency Plan, replenish emergency supplies. 2) Practice drill procedures with students(eg. fire, tornado, earthquake)	Resources Needed: 1) Time to identify, develop and publicize and practice procedures. 2) Seek resources (ie. other Disaster Preparedness handbook) that assist with the continuing development of these procedures. 3) Inform parents/guardians, in Family Handbook, regarding procedures should a disaster occur. 4) Post 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: 1) Practice CPR procedures. 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 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.

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. 2) Include traditional Montessori Grace & Courtesy lessons in curriculum. 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.
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 (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
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. 2) Include traditional Montessori Grace & Courtesy lessons in curriculum. 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.
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 Appendices Emergency Contact Numbers

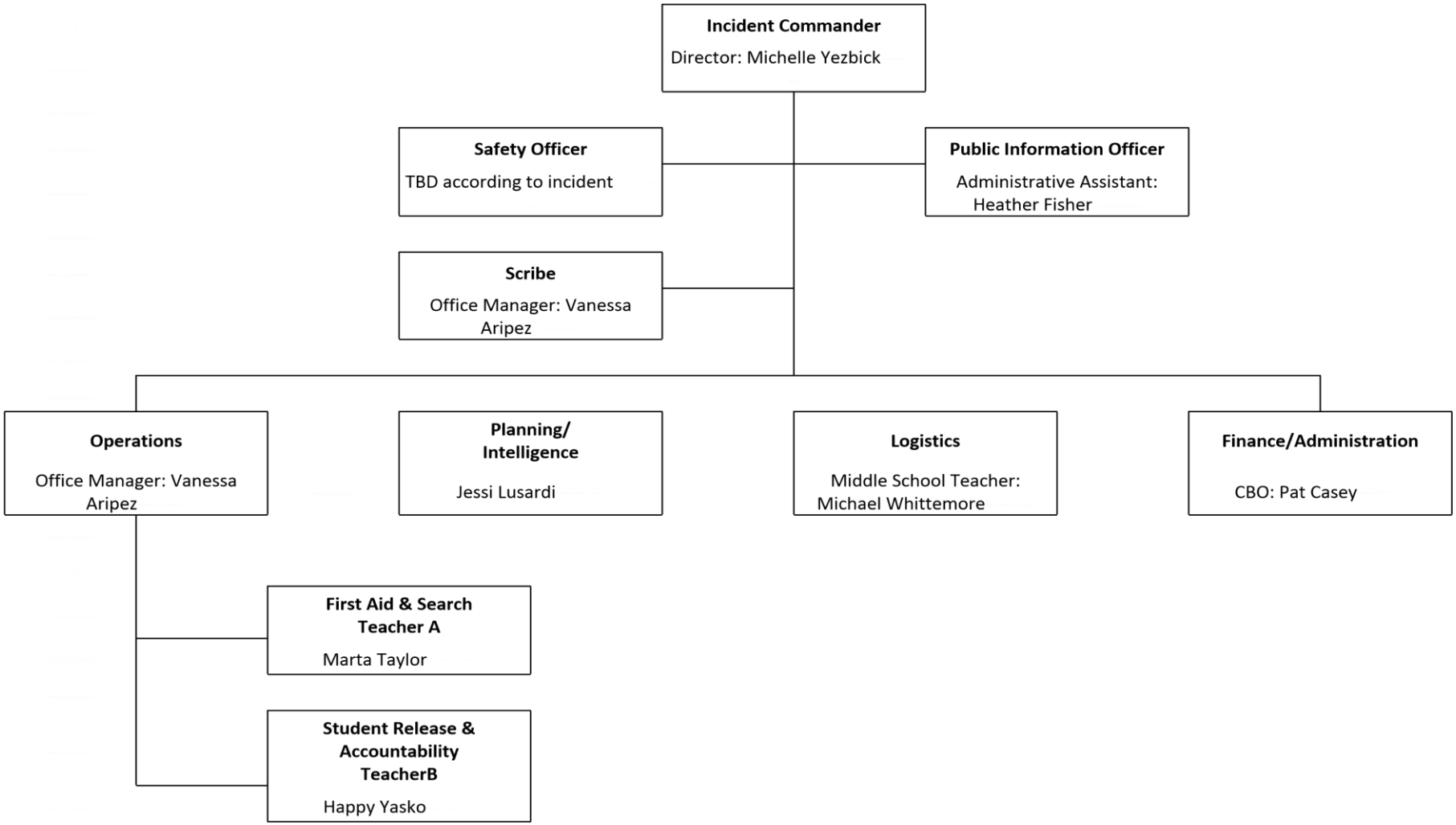
Utilities, Responders and Communication Resources

Type	Vendor	Number	Comments
Law Enforcement/Fire/Paramedic	Chico Police Department	530-897-4900	
Law Enforcement/Fire/Paramedic	Chico Fire Department	530-897-3400	
Law Enforcement/Fire/Paramedic	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.

2. 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).
4. All support personnel report to the Director at the Release Center after their students are released.
5. The designated staff member will coordinate the Sweep Teams.
6. 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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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.

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 can 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. 552.3929. 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

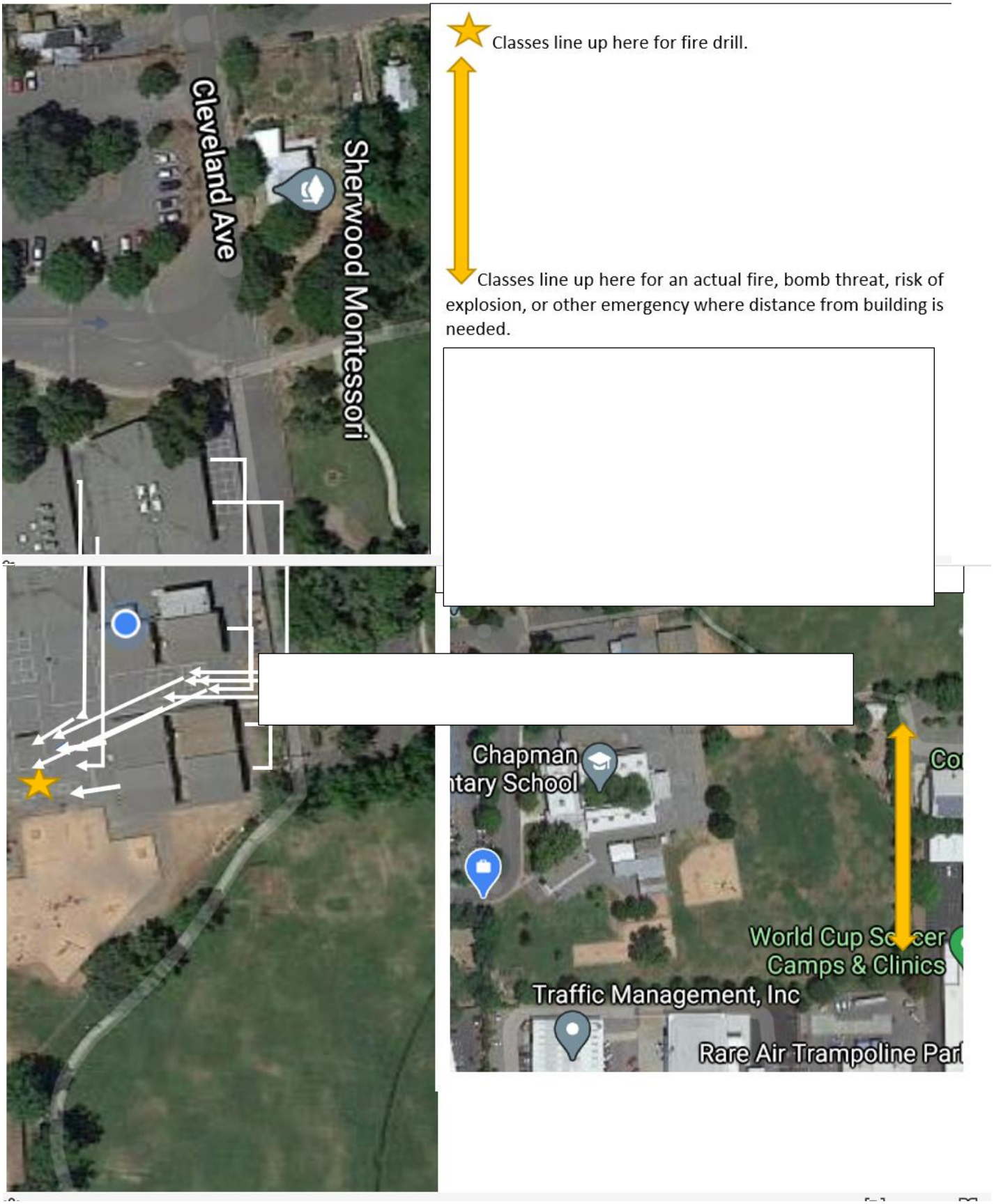
- Implement sanitization and disinfection procedures
- Deploy solid waste disposal plans
- Review processes and incident communication protocols
- Review impact on the school and community
- Evaluate lessons learned
- Review and revise procedures, as needed
- Retrain staff

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 16, 2023

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 2/8/2023	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.

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.

For the 2021-2022 school year, physical distancing was no longer required. After March 11, 2022 wearing masks at school was optional.

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, 2020 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: 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. ii. Sufficient duration of decline or stability of confirmed cases, hospitalizations, and deaths. iii. Sufficient surge capacity exists in local hospitals.

The school is administering rapid antigen tests. Area hospitals are no longer impacted. 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. ii. Have a plan for an ongoing supply of protective equipment. iii. Purchase a sufficient number of no-touch thermal scan thermometers for symptom screenings. 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 replenish supplies when needed.

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.

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: 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. 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. iii. Additional close contacts at school outside of a classroom should also isolate at home. iv. Additional areas of the school visited by the COVID-19-positive individual may also need to be closed temporarily for cleaning and disinfection. 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 option. 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) and testing positive for COVID-19.

Staff and students who are sick or have tested positive for COVID-19 will be required to follow current CDPH/BCDPH isolation and quarantine guidance.

As of 9/30/2022, 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:

Below is from: https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/COVID-19/K-12-Guidance-2022-23-School-Year.aspx
a. K-12 schools are encouraged to develop standard criteria for managing students who develop symptoms of infectious diseases, including COVID-19. In most situations, any student who develops new, unexplained symptoms should not return to campus until it is clear that symptoms are mild and improving or are due to a non-infectious cause (e.g., allergies). This includes waiting until 24 hours have passed since resolution of fever without the use of fever-reducing medications.
b. Additionally, if symptoms are concerning for COVID-19, it is strongly recommended that students wear a mask and get tested immediately. Students should also follow CDPH recommendations for retesting and/or isolating if results are positive.
c. Schools should avoid policies that incentivize coming to school while sick.

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 (observe for symptoms of illness) 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. ii. Active Screening. If a student becomes ill while at school, a touchless thermometer temperature read will be taken. A COVID-19 rapid antigen test may be administered if consent has been given. If a student is symptomatic while entering campus or during the school day: 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. 2. Students should remain in isolation with continued supervision and care until picked up by an authorized adult. 3. Follow established guidelines for triaging students in the health office, recognizing not all symptoms are COVID-19 related. 4. Advise parents of sick students that students are not to return until they have met CDPH criteria to discontinue home isolation.

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.

iv. 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 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.

Staff Entering Campuses

Condition Met	Condition Assessed
Yes	i. Passive Screening. Instruct stay home if they have symptoms consistent with COVID-19 or if they have a positive test result for COVID-19. ii. Active Screening. If a staff member becomes ill while at school, a touchless thermometer temperature read will be taken. A COVID-19 rapid antigen test may be administered if consent has been given. iii. Exclude employees who are exhibiting symptoms from the workplace. a Staff members who develop symptoms of illness should be sent home. Have emergency substitute plans in place. b Advise sick staff members not to return until they have met CDPH criteria to discontinue home isolation if positive for COVID-19.

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 rarely present on campus one morning per week. Our nurse will 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 have a contagious illness may not come to work.

1. Staff members who have a contagious illness in an actively contagious stage of the illness 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
	CDPH has suspended recommendations to restrict outside visitors and groups.

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: i. Providing opportunities for students and staff to meet handwashing frequency guidance. ii. Ensuring sufficient access to handwashing and sanitizer stations. 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: 1-800222-1222. Note: frequent handwashing is more effective than the use of hand sanitizers.

i. Teachers and staff teach students proper handwashing techniques and monitor handwashing 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: 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. ii. Wash hands before eating a snack or meal; after playing outside; before and after using restroom; after blowing nose, coughing, and sneezing; and before and after eating and preparing foods. iii. CDC guidance on proper PPE use.

i. & ii. Teachers and staff teach students proper handwashing techniques and monitor handwashing routines 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: i. Use tissue to wipe the nose and cough and sneeze inside the tissue. 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: i. Training and information should be provided to staff and students on proper use, removal, and washing of cloth face coverings. 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. 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. Face coverings are optional and are available for staff and students who wish to wear them. ii. Other protective equipment is provided, as appropriate for work assignments. iii. For employees engaging in symptom screening, provide surgical masks, face shields, and disposable gloves are available.

Wearing face coverings is optional for staff and students.

ii. Masks are provided for any staff or student who does not have one. iii. 1. & 2. Other protective equipment is provided as appropriate, including: N95 masks, surgical masks, gloves

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

Yes	Students may wear face coverings if they choose, they are available in the office.

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~~	This guidance is no longer relevant.

Creating Smaller Student/Educator Cohorts & Minimizing Movement

Condition Met	Condition Assessed
~~Yes~~	This guidance is no longer relevant.

We are no longer keeping stable cohorts as updated guidance does not require it.

Alternative to Physical Distancing

Condition Met	Condition Assessed
~~Yes~~	This guidance is no longer relevant.

All staff and students have the option to wear face coverings indoors as directed by health guidance.

Student Physical Distancing

Condition Met	Condition Assessed
~~Yes~~	This guidance is no longer relevant.

Student physical distancing is no longer required.

Staff Physical Distancing

Condition Met	Condition Assessed
~~Yes~~	Physical distancing is no longer required.

Physical distancing is no longer required.

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~~	This guidance is no longer relevant.

Updated guidance takes into account the lack of transmission by fomites.

Items Difficult to Clean and Sanitize

Condition Met	Condition Assessed
~~Yes~~	This guidance is no longer relevant.

Safe Use of Disinfectants

Condition Met	Condition Assessed
~~Yes~~	It is no longer necessary to disinfect on a regular basis, but if a student or staff member has been on campus with a known contagious illness we have safe disinfectants that can be used on surfaces.

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.

Handling Student Belongings

Condition Met	Condition Assessed
~~Yes~~	This guidance is no longer relevant.

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. 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. ii. Consider rolling staff cohorts to meet needs and avoid overwork.

Physical distancing requirements are no longer in effect, however, illnesses (COVID-19, RSV, flu, etc.) continue to require the use of substitute staffing.

Staff Training

Condition Met	Condition Assessed
Yes	Develop and provide staff training or utilize state -provided training on: 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. ~~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 vii. following:

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.
2. Cough and sneeze etiquette.
3. Keeping one's hands away from one's face.
4. Frequent handwashing and proper technique.
5. Confidentiality around health recording and reporting. vi. Training for school health staff on clinical manifestations of COVID-19, pediatric presentations, and CDC transmission based precautions.

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 Vector 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. Staff are trained every year on Bloodborne pathogens and how to protect themselves and others with proper use of PPE and disinfectants.

v. State and local health standards and recommendations have been communicated to staff through the Vector 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.

Training on removal and washing of cloth face coverings was 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

Training on suicide prevention is given in accordance to state law. Teachers and staff receive relevant training on trauma-informed practices for educators

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 has been presented through Vector 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 wellness counselor and two interns have been added to the school staff, as well as a behavioral health counselor.

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. 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
- Back to School Plan, presented to school community via Zoom on July 21, 2020, recording made available
- Four Town Halls during the 2021-2022 school year were conducted and four are planned for 2022-2023
- 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 selfreporting symptoms. vi. Criteria and plan to close schools again for physical attendance of students.

Communication to staff, students, and parents about COVID-19-related protocols has been 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 included: 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.

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. i. Address the school's role in documenting, reporting, tracking, and tracing infections in coordination with public health officials. 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. 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. iv. Provide information to parents regarding labor laws, Disability Insurance, Paid Family Leave, and Unemployment Insurance. v. Advise sick staff members and children not to return until they have met CDC criteria to discontinue home isolation. 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

REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS

Physical Address of Meeting: 1017 E. 16th Street Room 3
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)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, March 23, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

B. CONSENT AGENDA (6:05 p.m.)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, February 16, 2023.
B.2 Audit The Board is asked to accept the Independent Financial Audit for the 2021-2022 fiscal year.

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 School Director Report
E.2.2 Treasurer Report
E.2.3 SMPO Report
E.2.4 Board Report

E.3 Action Items (6:40)

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 Adoption of Second Interim Budget
Consider adopting the Second Interim Budget.
Action Requested: Adopt budget.

E.4 Board Governance (6:55)

E.4.1 Elections Committee Update The Elections Committee will update the Board on recruitment efforts.
E.4.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

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 MINUTES OF THE BOARD OF DIRECTORS

Physical Address of Meeting: 2465 Carmichael Dr. Chico, CA 95928

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

Meeting ID: 524 521 7471
Passcode: Jav83w
One tap mobile
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+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, February 16, 2023– 6:00 p.m.**

MINUTES

A. CALL TO ORDER

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole Unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters and air of this place. We extend our respects to the Mechoopda ancestors elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Tina Hanson-Lewis, Robyn Howley, Jolynn Aanenson

Russell Shapiro called meeting to order at 6:07PM, Beth Hammer, Tina Hanson- Lewis Jolynn Aanenson were in attendance, Robyn Howley was absent.

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B. CONSENT AGENDA

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, January 19, 2023.

B.2 Audit Extension The audit deadline is extended until February 28.

Jolynn motioned to approve the consent agenda, Tina Hanson-Lewis seconded with unanimous approval of present 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.

No comments

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 Board Report

Michelle Yezbick presented Instructional Staff Report and School Director Report, Pat Casey presented Treasurer Report. Russel Shapiro discussed SMPO report, no Board report was presented. Discussion Followed

E.3 Action/Discussion Items

E.3.1 Dashboard Data The School Director will present a report on Sherwoods Dashboard from The California Department of Education

Action: Requested: Discuss Dashboard Data

Michelle Yezbick presented Dashboard Data, discussion followed

E.3.2 Arts, Music, and Instructional Materials (AMIM) Discretionary Block Grant The Board will consider adoption of a plan for AMIM funds
Action Requested: Approve spending plan for AMIM

Russell Shapiro and Michelle Yezbick presented plan for AMIM, Beth Hammer motioned for approval, Tina Hanson-Lewis seconded with all present members unanimous approval

E.3.3 School Accountability Report Card (SARC) The Board will be asked to approve the SARC
Action Requested: Approve SARC

SARC was reviewed and discussed by the Board, Jolynn Aanenson motioned for approval, Russell Shapiro seconded with unanimous approval from present Board members

E.3.4 Safety Report The Board will be asked to approve the updated Comprehensive School Safety Plan.
Action Requested: Approve Safety Plan

Safety plan was reviewed by the Board, Tina Hanson-Lewis motioned for approval of updated Plan, Beth Hammer seconded with unanimous Board approval

E.3.5 School Plan for Safe Operations During Pandemic The Board will be asked to approve the updated School Plan for Safe Operations During Pandemic
Action Requested: Approve updated Plan

Updated plan was reviewed and discussed by the Board, Jolynn Aanenson motioned for approval, Tina Hanson-Lewis seconded with unanimous Board approval

E.4 Board Governance

E.4.1 Book Discussion: Diverse Families, Desirable Schools Public Montessori in the Era of School Choice (Debs,2019)

Russell Shapiro and Tina Hanson-Lewis led book discussion with Board.

F. FUTURE AGENDA ITEMS

The Elections Committee will report on recruitment efforts
The Board will be asked to accept the Independent Financial Audit for the 2021-2022 fiscal year.

G. ADJOURNMENT

Russell Shapiro adjourned meeting at 7:24 PM

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February 28, 2023

Board of Directors
Sherwood Montessori
Chico, CA

55 Independence Circle, Suite 102
Chico, CA 95973
530.588.7427

We have audited the financial statements of Sherwood Montessori (the Charter School), as of and for the year ended June 30, 2022, and have issued our report thereon dated February 28, 2023. Professional standards require that we advise you of the following matters relating to our audit.

Our Responsibility in Relation to the Financial Statement Audit

As communicated in our engagement letter dated May 4, 2022, our responsibility, as described by professional standards, is to form and express an opinion about whether the financial statements that have been prepared by management with your oversight are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America. Our audit of the financial statements does not relieve you or management of your respective responsibilities.

Our responsibility, as prescribed by professional standards, is to plan and perform our audit to obtain reasonable, rather than absolute, assurance about whether the financial statements are free of material misstatement. An audit of financial statements includes consideration of internal control over financial reporting as a basis for designing 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 over financial reporting. Accordingly, as part of our audit, we considered the internal control of the Charter School solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control.

We are also responsible for communicating significant matters related to the audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures for the purpose of identifying other matters to communicate to you.

Planned Scope and Timing of the Audit

We conducted our audit consistent with the planned scope and timing we previously communicated to you in our planning letter dated July 18, 2022.

Compliance With All Ethics Requirements Regarding Independence

The engagement team, others in our firm, as appropriate, our firm, and our network firms have complied with all relevant ethical requirements regarding independence.

Safeguards have been implemented to reduce the threats on our independence. These safeguards include continuing education related to independence and ethics requirements; peer review of our firm's quality control system; our firm's internal policies and procedures which are designed to monitor compliance with the independence requirements; and the involvement of another firm partner who is responsible for completing an independent technical review of the financial statements and significant audit conclusions.

Significant Risks Identified

Management override of internal controls was identified as a significant risk. Although a risk not solely specific to the Charter School, override of internal controls warrants attention as intentional override may be more difficult to detect than an unintentional error. To address this risk, we maintained professional skepticism throughout the audit, and incorporated an element of unpredictability in designing our audit procedures.

Qualitative Aspects of the Charter School's Significant Accounting Practices

Significant Accounting Policies Management has the responsibility to select and use appropriate accounting policies. A summary of the significant accounting policies adopted by the Charter School is included in note 1 to the financial statements. There have been no initial selections of accounting policies and no changes in significant accounting policies or their application during the year ended June 30, 2022. No matters have come to our attention that would require us, under professional standards, to inform you about: (1) the methods used to account for significant unusual transactions, and (2) the effect of significant accounting policies in controversial or emerging areas for which there is a lack of authoritative guidance or consensus.

Significant Accounting Estimates Accounting estimates are an integral part of the financial statements prepared by management and are based on management's current judgments. Those judgments are normally based on knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ markedly from management's current judgments.

The most sensitive accounting estimate affecting the financial statements is depreciation expense. Management's estimate of the depreciation expense is based on the assets' estimate useful lives. We evaluated the key factors and assumptions used to develop the depreciation expense and determined that it is reasonable in relation to the basic financial statements as a whole.

Financial Statement Disclosures Certain financial statement disclosures involve significant judgement and are particularly sensitive because of their significant to financial statement users. The most sensitive disclosures affecting the Charter School's financial statements relate to the contingencies of COVID-19.

Significant Unusual Transactions

For the purposes of this communication, professional standards require us to communicate to you signficant unusual transactions identified during the audit. We did not identify any signficant unusual transactions.

Identified or Suspected Fraud

For the purposes of this communication, professional standards require us to communicate to you any identified or suspected fraud detected during the audit. We did not identify any fraud, although there is always a risk that fraud may exist that has not been identified.

Significant Difficulties Encountered During the Audit

We encountered no significant difficulties in dealing with management relating to the performance of the audit.

Uncorrected and Corrected Misstatements

For purposes of this communication, professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are trivial, and communicate them to the appropriate level of management. Further, professional standards require us to also communicate the effect of uncorrected misstatements related to prior periods on the relevant classes of transactions, account balances, or disclosures, and the financial statements as a whole. Uncorrected misstatements or matters underlying those uncorrected misstatements could potentially cause future-period financial statements to be materially misstated, even though the uncorrected misstatements are immaterial to the financial statements currently under audit. Management has corrected all identified misstatements.

In addition, professional standards require us to communicate to you all material, corrected misstatements that were brought to the attention of management as a result of our audit procedures. The following material misstatements that we identified as a result of our audit procedures were brought to the attention of, and corrected by, management:

- Understatement of due from grantor governments of $84,812
- Understatement of accumulated depreciation of ($9,126)
- Understatement of due to grantor governments of ($86,324)
- Overstatement of advances from grantors of $27,500
- Understatement of beginning fund balance of $10,891

These adjustments resulted in a net decrease to net assets of $27,753.

Disagreements With Management

Professional standards define a disagreement with management as a matter, whether or not resolved to our satisfaction, concerning a financial accounting, reporting, or auditing matter, which could be significant to the Charter School's financial statements or the auditors' report. No such disagreements arose during the course of the audit.

Representations Requested From Management

We have requested certain written representations from management that are included in the management representation letter dated February 28, 2023.

Management's Consultations With Other Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters. Management informed us that, and to our knowledge, there were no consultations with other accountants regarding auditing and accounting matters.

Other Significant Matters, Findings, or Issues

In the normal course of our professional association with the Charter School, we generally discuss a variety of matters, including the application of accounting principles and auditing standards, operating and regulatory conditions affecting the Charter School, and operational plans and strategies that may affect the risks of material misstatement. None of the matters discussed resulted in a condition to our retention as the Charter School's auditors.

This information is intended solely for the use of the Charter School's Board of Directors and management of the Charter School, and is not intended to be, and should not be used by anyone other than these specified parties.

Very truly yours,

Horton McNulty & Gaeta LLP

Sherwood Montessori

Chico, California
Charter School #1166

FINANCIAL STATEMENTS AND SUPPLEMENTARY INFORMATION
WITH INDEPENDENT AUDITORS' REPORTS

June 30, 2022

HORTON MCNULTY & SAETEURN, LLP

Sherwood Montessori
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June 30, 2022

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INDEPENDENT AUDITORS' REPORT

To the Board of Directors
Sherwood Montessori
Chico, California

Report on the Audit of the Financial Statements

Opinion

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, 2022; the related statements of activities and cash flows for the year then ended; and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Charter School as of June 30, 2022, 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.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Charter School and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America; and for 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.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Charter School's ability to continue as a going concern for one year after the date that the financial statements are issued.

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit 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, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Charter School's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control–related matters that we identified during the audit.

Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the financial statements taken as a whole. The accompanying schedules of average daily attendance and instructional time are presented for purposes of additional analysis and are 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 February 28, 2023, 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

February 28, 2023
Chico, California

FINANCIAL SECTION

Sherwood Montessori

STATEMENT OF FINANCIAL POSITION

June 30, 2022

ASSETS		
Current Assets		
Cash and cash equivalents	$	549,456
Accounts receivable		301
Due from federal government		29,001
Due from state government		151,676
Due from local governments		39,704
Total Current Assets		770,138
Property and Equipment		
Net of accumulated depreciation		237,477
TOTAL ASSETS	$	1,007,615
LIABILITIES AND NET ASSETS		
Current Liabilities		
Accounts payable	$	8,193
Accrued payroll and payroll liabilities		88,464
Due to state government		122,884
Due to local governments		1,185
Advances from grantors		1,757
Total Liabilities		222,483
Net Assets		
Without donor restrictions		642,655
With donor restrictions		142,477
Total Net Assets		785,132
TOTAL LIABILITIES AND NET ASSETS	$	1,007,615

The accompanying notes are an integral part of these financial statements.

Sherwood Montessori

STATEMENT OF ACTIVITIES

Year Ended June 30, 2022	Without Donor Restrictions	With Donor Restrictions	Total
Revenue and Other Support			
Local control funding formula sources	$ 979,323	$ -	$ 979,323
Federal revenue	-	197,024	197,024
State revenue	151,176	187,644	338,820
Contributions	6,730	-	6,730
Net assets released from restrictions	419,512	(419,512)	-
Total Revenue and Other Support	1,556,741	(34,844)	1,521,897
Expenses			
Program services:			
Instruction services	1,073,831	-	1,073,831
Instruction-related services	195,306	-	195,306
Pupil services	123,432	-	123,432
Ancillary services	102,602	-	102,602
Plant services	91,135	-	91,135
Total Program Services	1,586,306	-	1,586,306
Supporting services:			
General administration	274,796	-	274,796
Total Expenses	1,861,102	-	1,861,102
Change in Net Assets	(304,361)	(34,844)	(339,205)
Net Assets - Beginning of Year	947,016	177,321	1,124,337
Net Assets - End of Year	$ 642,655	$ 142,477	$ 785,132

The accompanying notes are an integral part of these financial statements.

Sherwood Montessori

STATEMENT OF CASH FLOWS

Year Ended June 30, 2022

CASH FLOWS FROM OPERATING ACTIVITIES		
Change in net assets	$	(339,205)
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Depreciation		9,126
Changes in:		
Accounts receivable		(301)
Due from federal government		(3,146)
Due from state government		221,473
Due from local governments		30,708
Accounts payable		(3,371)
Accrued payroll and payroll liabilities		24,281
Due to federal government		(1,375)
Due to state government		2,870
Due to local governments		(8,935)
Refundable advances		(27,500)
NET CASH USED IN OPERATING ACTIVITIES		(95,375)
Cash and Cash Equivalents - Beginning of Year		644,831
Cash and Cash Equivalents - End of Year	$	549,456

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.

Accounts Receivable and Due From Federal, State, and Local Governments Accounts receivable represent amounts due from private persons, firms, or corporations based on contractual agreements or amounts billed but not received as of June 30, 2022. 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, 2022. 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.

Advances from Grantors 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, 2022, were $7,660.

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 February 28, 2023, 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, 2022		
Cash and cash equivalents	$	549,456
Accounts receivable		301
Due from federal government		29,001
Due from state government		151,676
Due from local governments		39,704
Total Financial Assets	$	770,138

Of this amount, $1,757 represents advances from grantors 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, 2022		
Land	$	95,000
Buildings and improvements		182,515
Subtotal		277,515
Less: Accumulated depreciation		40,038
Property and Equipment - Net	$	237,477

Depreciation expense amounted to $9,126 for the year ended June 30, 2022.

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, 2022		
Book value of assets acquired with Clean Energy grant	$	142,477

6. FUNCTIONAL EXPENSE ANALYSIS

The table below presents expenses by both their nature and their function for the fiscal year ended June 30, 2022.

	Program Activities							
Year Ended June 30, 2022	Instruction Services	Instruction-Related Services	Pupil Services	Ancillary Services	Plant Services	Program Subtotal	General Administration	Total Expenses
Certificated salaries	$ 538,843	$ -	$ 49,780	$ -	$ -	$ 588,623	$ -	$ 588,623
Classified salaries	184,419	126,998	50,755	67,591	-	429,763	54,428	484,191
Employee benefits	239,500	57,291	22,897	30,492	-	350,180	24,553	374,733
Books and supplies	50,332	-	-	4,519	8,097	62,948	13,698	76,646
Services and other operating	51,611	11,017	-	-	83,038	145,666	182,117	327,783
Depreciation	9,126	-	-	-	-	9,126	-	9,126
Total Expenses	$ 1,073,831	$ 195,306	$ 123,432	$ 102,602	$ 91,135	$ 1,586,306	$ 274,796	$ 1,861,102

7. 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.

8. 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.

9. 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 *Annual Comprehensive Financial Report* (ACFR) that includes financial statements and required supplementary information. Copies of the ACFR may be obtained from CalSTRS, 100 Waterfront Place, Sacramento, California, 95605, and from www.calstrs.com.

According to the most recently available ACFR for the fiscal year ended June 30, 2021, the total pension liability for STRP was $355,801,000,000, fiduciary net position was $310,293,000,000, employer and state contributions totaled $10,258,558,263, and the plan is 87% 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 2021-22 was 16.92% 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, 2022, 2021, and 2020, were $102,696, $73,306, and $80,907, respectively, and equaled 100% of the required contributions for the year. State Teachers' Retirement Law also requires the state to contribute 10.828% of the members' creditable earnings from the fiscal year ending in the prior calendar year. For the year ended June 30, 2022, the Charter School recognized pension expense of $53,609 and revenue of $53,609 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 ACFR that includes financial statements and required supplementary information. Copies of the ACFR may be obtained from CalPERS, 400 Q Street, Sacramento, California, 95811, and from www.calpers.ca.gov.

According to the most recently available ACFR for the fiscal year ended June 30, 2021, the School Employer Pool total pension liability was $106,857,488,000, fiduciary net position was $86,523,056,000, employer contributions totaled $2,969,799,498, and the plan is 81% 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 2021-22 fiscal year was 22.91%. 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, 2022, 2021, and 2020, were $42,965, $30,388, and $27,402, respectively, and equaled 100% of the required contributions for each year.

10. 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

Sherwood Montessori

LOCAL EDUCATIONAL AGENCY ORGANIZATION STRUCTURE

June 30, 2022

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 AVERAGE DAILY ATTENDANCE

June 30, 2022

	Originally Reported		Final	
	Second Period Report	Annual Report	Second Period Report	Annual Report
ELEMENTARY				
Regular ADA				
Transitional kindergarten/kindergarten through grade 3	59	61	59	61
Grades 4 through 6	34	34	34	34
Grades 7 through 8	8	7	8	7
Classroom-Based ADA Totals	101	102	101	102

See the accompanying note to the other supplementary information.

Sherwood Montessori

SCHEDULE OF INSTRUCTIONAL TIME

Year Ended June 30, 2022

	Minutes Requirement	Days Requirement	Actual Minutes Offered	Actual Days Offered	Approved J-13A Credited Minutes*	Approved J-13A Credited Days*	Total Traditional Calendar Minutes	Total Traditional Calendar Days	Multitrack Calendar Days	Status
Kindergarten	36,000	175	54,150	180	-	-	54,150	180	N/A	Complied
Grade 1	50,400	175	54,150	180	-	-	54,150	180	N/A	Complied
Grade 2	50,400	175	54,150	180	-	-	54,150	180	N/A	Complied
Grade 3	50,400	175	54,150	180	-	-	54,150	180	N/A	Complied
Grade 4	54,000	175	55,000	180	-	-	55,000	180	N/A	Complied
Grade 5	54,000	175	55,000	180	-	-	55,000	180	N/A	Complied
Grade 6	54,000	175	55,000	180	-	-	55,000	180	N/A	Complied
Grade 7	54,000	175	55,000	180	-	-	55,000	180	N/A	Complied
Grade 8	54,000	175	55,000	180	-	-	55,000	180	N/A	Complied

**The Charter School did not apply for any Form J-13A emergency closure days.*

See the accompanying note to the other supplementary information.

PURPOSE OF SCHEDULE OF INSTRUCTIONAL TIME

Schedule of Average Daily Attendance

Average daily attendance is a measure of the number of pupils attending classes of the Charter School. The purpose of attendance accounting from a fiscal standpoint is to provide the basis on which apportionments of state funds are made to charter schools. This schedule provides information regarding the attendance of students at various levels.

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 47612 and 47612.5.

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, 2022; 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 February 28, 2023.

Report on 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)

Report on 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.

Horton McNulty & Gaeteurn, LLP

February 28, 2023
Chico, California

INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE AND ON INTERNAL CONTROL OVER STATE COMPLIANCE

To the Board of Directors
Sherwood Montessori
Chico, California

Report on Compliance

Opinion on State Compliance

We have audited Sherwood Montessori's (the Charter School) compliance with the requirements specified in the *2021-22 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel, applicable to the District's state program requirements identified below for the year ended June 30, 2022.

In our opinion, the Charter School complied, in all material respects, with the laws and regulations of the state programs noted in the table on pages 26 and 27 for the year ended June 30, 2022.

Basis for Opinion

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the *2021-22 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the Charter School and to meet our ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion. Our audit does not provide a legal determination of the Charter School's compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules, and provisions of contracts or grant agreements applicable to the Charter School's state programs.

INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE AND ON INTERNAL CONTROL OVER STATE COMPLIANCE
(Continued)

Auditors' Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the Charter School's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the *2021-22 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the Charter School's compliance with the requirements of the state programs as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the *2021-22 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting,* we:

- Exercise professional judgment and maintain professional skepticism throughout the audit;
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the Charter School's compliance with the compliance requirements referred to above and performing such procedures as we considered necessary in the circumstances;
- Obtain an understanding of the Charter School's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the *2021-22 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, but not for the purpose of expressing an opinion on the effectiveness of the Charter School's internal control over compliance. Accordingly, no such opinion is expressed; and
- Select and test transactions and records to determine the Charter School's compliance with the state laws and regulations applicable to the following items:

INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE AND ON INTERNAL CONTROL OVER STATE COMPLIANCE
(Continued)

June 30, 2022		Procedures Performed
Local Education Agencies Other than Charter Schools:		
A.	Attendance	Not applicable
B.	Teacher certification and misassignments	Not applicable
C.	Kindergarten continuance	Not applicable
D.	Independent study	Not applicable
E.	Continuation education	Not applicable
F.	Instructional time	Not applicable
G.	Instructional materials	Not applicable
H.	Ratios of administrative employees to teachers	Not applicable
I.	Classroom teacher salaries	Not applicable
J.	Early retirement incentive	Not applicable
K.	Gann limit calculation	Not applicable
L.	School accountability report card	Not applicable
M.	Juvenile court schools	Not applicable
N.	Middle and early college high schools	Not applicable
O.	K-3 grade span adjustment	Not applicable
P.	Transportation maintenance of effort	Not applicable
Q.	Apprenticeship: Related and supplemental instruction	Not applicable
R.	Comprehensive school safety plan	Not applicable
S.	District of choice	Not applicable
School Districts, County Offices of Education, and Charter Schools:		
T.	California Clean Energy Jobs Act	No
U.	After/Before school education and safety program:	
	After school	No
	Before school	No
	General requirements	No
V.	Proper expenditure of education protection account funds	Yes
W.	Unduplicated local control funding formula pupil counts	Yes
X.	Local control and accountability plan	Yes
Y.	Independent study-course based	No
Z.	Immunizations	No
AZ.	Educator effectiveness	Yes
BZ.	Expanded learning opportunities grant (ELO-G)	Yes
CZ.	Career technical education incentive grant	No
DZ.	In-person instruction grant	Yes

June 30, 2022		Procedures Performed
Charter schools:		
AA.	Attendance	Yes
BB.	Mode of instruction	Yes
CC.	Nonclassroom-based instruction/independent study	No
DD.	Determination of funding for nonclassroom-based instruction	No
EE.	Annual instructional minutes – classroom based	Yes
FF.	Charter school facility grant program	No

Items A. through S. were not performed as they do not apply to charter schools.

Since the Charter School did not participate in the following programs during 2021-22, all steps related to them were not performed:

U. After/Before school education and safety program
Y. Independent study-course based
CZ. Career technical education incentive grant
FF. Charter school facility grant program

California Clean Energy Jobs Act (T) steps 1 and 2 were not performed because the Charter School did not have any expenditures during 2021-22 from California Clean Energy Jobs Act funds. California Clean Energy Jobs Act (T) step 4 was not performed because the Charter School had no final completion reports due during 2021-22.

Testing for immunizations (Z) was not performed because the Charter School did not include any schools that did not submit immunization assessment reports to the California Department of Public Health or that reported a high number of conditionally enrolled students. Testing was not performed for nonclassroom-based instruction/independent study for charter schools (CC) because the ADA for this program was below the level which requires testing. Since the Charter School did not generate more than 20% of total ADA through nonclassroom-based instruction (independent study), all steps related to the determination of funding for nonclassroom-based instruction (DD) were not performed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control Over Compliance

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, such that there is a reasonable possibility that material noncompliance with a compliance requirement will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditors' Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we considered to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that have not been identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the *2021-22 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Accordingly, this report is not suitable for any other purpose.

Horton McNulty & Gaeteurn, LLP

February 28, 2023
Chico, California

FINDINGS SECTION

None.

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.

Repeat Finding No, this is not a repeat finding.

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).

Current Status The provisions of *California Education Code*, Section 43504(d) and (e) applied only to the 2020-21 fiscal year, therefore no follow up is required.

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.

Repeat Finding No, this is not a repeat finding.

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.

Current Status Fully implemented.

Sherwood Montessori
Schedule of Year-End Adjusting Journal Entries
June 30, 2022

CLIENT TO RECORD THESE AUDIT ADJUSTMENTS IN THE GENERAL LEDGER

Description			SACS Object Account	Debit	Credit	
To be posted as of 7/1/22						
NCNB Checking			9120	221		
Due from Grantor Govts.:Due From State - LCFF			9290	20,996		
Audit adjustments			9793	106,714		
Due from Grantor Govts.			9290		40,072	
Accumulated Depreciation			9435		9,126	
Accounts Payable			9500		3,803	
Payroll Liabilities			9511		2,601	
Due to Grantor Govts.: Prop 39			9590		50,512	
Liabilities: Refundable Advances			9500		21,817	
To adjust the beginning net assets to agree to prior year audit report.						(11,234)
						343
Audit adjustments			9793	9,126		9,126
Accumulated depreciation			9435		9,126	
To record current year depreciation.						
Other Accts Payable:ESSER IPI			9590	21,817		
Audit adjustments			9793		21,817	(21,817)
To recognize in revenue IPI previously recorded as deferred (prior year audit).						
Due from Grantor Govts.:Due From CUSD - In Lieu			9290	41,267		
Due from Grantor Govts.:Due From State - LCFF			9290	87,540		
Other Accts Payable: Due to CUSD - In-Lieu			9590	1,363		
Other Accts Payable: Due to State - EPA			9590	21,776		
Audit adjustments			9793	27,794		27,794
Due from Grantor Govts.:EPA Funds Due			9290		41,070	
Other Accts Payable: Due to State - 8019			9590		79,245	
Other Accts Payable: Due to State - LCFF			9590		59,425	
To reclassify LCFF entitlement to appropriate funding buckets.						
Other Accts Payable: Due to CUSD-Dist. Oversight			9590	3,587		
Audit adjustments			9793		3,587	(3,587)
To adjust oversight fees to actual due at June 30.						
Accounts Payable			9500	3,803		
Audit adjustments			9793		3,803	(3,803)
To reverse 2021 accrual.						
Due from Grantor Govts.			9290	35,392		
Audit adjustments			9793	2,925		2,925
Due from Grantor Govts.: ELO			9290		16,500	
Due from Grantor Govts.: :ESSER - IPI			9290		21,817	
To clear unsupported and/or duplicate balances.						
Liabilities: Refundable Advances			9500	27,500		
Audit adjustments			9793		27,500	(27,500)
To clear refundable advances to revenue.						
						(27,753)

Reconciliation of Adjustments (Aggregate):	**Debit**	**Credit**
Due from Grantors	84,812	
Liabilities: Refundable Advances	27,500	
Unrestricted Net Assets	10,891	
Accumulated Depreciation		9,126
Due to Grantors		86,324
Audit Adjustments		27,753

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Local Control Accountability Plan (LCAP) Community Survey**

Date: March 23, 2023

SUMMARY

Each year, Sherwood community members and students are asked to fill a survey for LCAP planning purposes.

DISCUSSION

The LCAP is created annually for the following school year by collecting data from mulitple sources, including feedback from educational partners and students.

Sherwood has a core of questions it typically poses to its community and students for feedback to allow us to compare feedback over time. These cover the required areas to assess with community feedback. We also add new questions as needed, e.g.: during the pandemic we had questions about distance learning/in-person learning. The Student Surveys are consistent from year to year.

Please consider the questions and propose any that would capture additional data the Board would like to collect.

ACTION REQUESTED

Discuss Community Survey and Student Survey questions.

Attachment: Surveys from the 2022-2023 school year.

Community Survey:

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. support for students who need academic challenge
6. level of academic challenge
7. school's approach to discipline and conflict resolution using PBIS (Positive Beahvior Interventions and Supports)
8. students' emotional well-being at school
9. school climate in terms of respectfulness and inclusivity
10. I am given opportunity by the school to make an impact in academic outcomes for my student/s

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?

Did you know that:

- The SMPO, which stands for Sherwood Montessori Parents Organization, includes all teachers and parents (if you are a parent or guardian you are a member, no need to sign up or pay dues)?

- SMPO meetings, held three times in 2021-2022, are the way to share ideas for school events and find out how you can volunteer?

- That parents are asked to volunteer 50 hours per school year per family, and that the Family Handbook includes a list of over 30 ways to volunteer?

Upper Elementary/Middle School 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. My teacher treats me with kindness and respect.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

6. The aides and other adults at school treat me with kindness and respect.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

7. The students treat me with kindness and respect.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

8. The school helps students resolve conflicts with each other.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

9. I feel safe at school.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

10. The school rules are fair and easy to understand.

strongly agree agree neutral disagree strongly disagree

☐ ☐ ☐ ☐ ☐

---

11. My academic work has the right amount of challenge.

strongly agree ☐ agree ☐ neutral ☐ disagree ☐ strongly disagree ☐

---

12. I have enjoyed having Enrichment classes (when I go to another teacher's class on Tuesday and Wednesday afternoons).

strongly agree ☐ agree ☐ neutral ☐ disagree ☐ strongly disagree ☐

Please share any other ideas you might have to improve Sherwood. Thanks for your feedback!

Lower Elementary Survey:

For any "no" responses, can you please explain why?

1. I am happy to be a student at this school. Yes ☐ No ☐
2. I get to do interesting activities at school. Yes ☐ No ☐
3. I am learning a lot. Yes ☐ No ☐
4. I feel I am part of the school community. Yes ☐ No ☐
5. My teacher treats me with kindness and respect. Yes ☐ No ☐
6. The aides and other adults at school treat me with kindness and respect. Yes ☐ No ☐
7. The students treat me with kindness and respect. Yes ☐ No ☐
8. The school helps students resolve conflicts with each other. Yes ☐ No ☐
9. I feel safe at school. Yes ☐ No ☐
10. The school rules are fair and easy to understand. Yes ☐ No ☐
11. My work has the right amount of challenge. Yes ☐ No ☐

12. I have enjoyed having Enrichment classes (when I go to another teacher's class on Tuesday and Wednesday afternoons). Yes ☐ No ☐

Please share any other ideas you might have to improve Sherwood. Thanks for your feedback!

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **School Director Report**

Date: March 23, 2023

Administrative

- Updated enrollment will be reported at the meeting.
- We are collecting "Intent to Enroll" forms from our families as required in the process for allocating space for Sherwood on Chapman's campus. We have until the end of April to collect the forms.

Employees, Interns, and Independent Contractors

- We have added Jackeline Contreras to our Extended Day staff.
- We continue to interview substitute teachers as the need is still high. I have worked in substitute positions two days of this month myself.
- Our Speech and Language Pathologist, Anna Meehan, has accepted a job in Shasta County for next year. We will be looking for a new speech teacher for the 2023-2024 school year with an agreement with Blue Oak so we can offer a full time position.

Community

- Butte Environmental Council (BEC) will be planting apple trees and shade trees on our campuses.

Safety

- Chico Unified School District removed a damaged tree from the front of the main campus building. Sherwood will have a dead tree removed from the 1010 campus, as well as dead limbs removed from another tree to the rear of the property.

SHERWOOD MONTESSORI

To: Board of Directors

From: Pat Casey, Business Manager

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

Date: March 23, 2023 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 February 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 589,776.16 as of February 28,2023 for the checking account.
- The expenses in January were for the normal operating cost.

Profit & Loss

- The January Profit & Loss report shows a Net Income of $ -181,900, which was offset by $22,004 of February LCF funds deposited in March 2023 along $10,309 State/Fed Grant funds.

Cash Flow

- Assuming all State and Federally allocated funds are received and state aid is calculated on an Annual ADA of at least 91, the school is projected to end the year with a positive cash balance.

Sherwood Montessori
Profit & Loss YTD Comparison
July 2022 through February 2023

	Jul '22 - Fe...
Ordinary Income/Expense	
Income	
8000-Revenues	
8010-8099 Revenue Limit Sources	633,517
8110-8290 Federal Revenues	170,441
8300-8599 Other State Revenue	281,902
8600-8799 Other Local Revenue	13,968
Total 8000-Revenues	1,099,828
Total Income	1,099,828
Gross Profit	1,099,828
Expense	
1000 Certificated Salaries	446,482
2000 Classified Salaries	311,672
3000-Employee Benefits	241,477
4000-Books and Supplies	41,940
5000 Services/Other Op. Exp.	240,157
Total Expense	1,281,728
Net Ordinary Income	-181,900
Net Income	**-181,900**

Sherwood Montessori
Board of Directors - Vendor Payments Report
February 2023

Type	Date	Num	Name	Memo	Account	Amount
Bill	02/01/2023		Blue Shield of California	BILLING FEBRUARY 2023	3401-Health Benefits	10,085.66
Check	02/01/2023	ACH	Macquarie Equipment Capit...	Kyocera Copier Lease 2023 ...	Copier Lease	220.94
Check	02/01/2023	DBT	Amazon.com	RUBBER BANDS - BANDA...	Instructional Supplies	50.75
Check	02/01/2023	DBT	Amazon.com	DON'T BREAK THE ICE GA...	Instructional Supplies	8.57
Check	02/01/2023	DBT	Amazon.com	KINETIC SAND	Instructional Supplies	18.22
Check	02/02/2023	DBT	1 & 1 Internet Inc.	Internet hosting- 3MO. 2023 ...	Website, Hosting	45.00
Check	02/02/2023	9624	IT Management Corp	INV 7007-PART 2	Computers and Electronics	1,578.59
Check	02/02/2023	9625	Steven Duke	TECHNICAL SUPPORT - IN...	Maintenance Supplies	125.00
Check	02/02/2023	EFT	Laura Swanson {Other}	BH SUPPLIES	Instructional Supplies	44.30
Check	02/02/2023	EFT	Comcast 4454	SERVICE - 2023 JAN-FEB	Internet Service Provider	249.94
Check	02/02/2023	DBT	Amazon.com	BANDAGES	Office Supplies	34.75
Check	02/03/2023	DBT	Amazon.com	COMPOSITION NOTEBOO...	Instructional Supplies	12.32
Check	02/03/2023	DBT	Amazon.com	MAGIC ERASER	Custodial Supplies	14.20
Check	02/06/2023	9626	Zach Cerullo	LIVESCAN	LiveScan and TB Test Servi...	66.00
Check	02/06/2023	DBT	Costco	SNACKS-SUPPLIES	Extended Day	338.15
Check	02/06/2023	DBT	Target	KITCHEN-OFFICE	Office Supplies	33.67
Check	02/06/2023	DBT	Amazon.com	GRAPH PAPER	Instructional Supplies	29.22
Check	02/06/2023	DBT	Amazon.com	NEWSPRINT PAPER	Instructional Supplies	65.72
Check	02/06/2023	ACH	CharterSAFE	BILLED PREMIUM - LIABILI...	5400-Liability Insurance	3,000.00
Check	02/06/2023	ACH	CharterSAFE	BILLED PREMIUM - WC 20...	3601-Workers Comp	747.00
Check	02/07/2023	DBT	Amazon.com	BROOM	Custodial Supplies	200.25
Check	02/08/2023	9627	Anna Meeham [Other]	CERTIFIED MAIL	Postage	9.48
Check	02/08/2023	9628	EMMA CLUFF	REIMB USD CBT TRAINING	Contracted Service	35.00
Check	02/08/2023	9629	KINETICS ACADEMY OF ...	MARLO	Instructional Supplies	60.00
Check	02/08/2023	EFT	Laura Swanson {Other}	QRFY.COM ANNUAL FEE	5800-Other Services	330.09
Check	02/08/2023	EFT	Laura Swanson {Other}	BH SUPPLIES	Instructional Supplies	21.74
Check	02/08/2023	EFT	Waste Management	SERVICE 2023 JAN	Trash/Recycling	133.76
Check	02/08/2023	9622	San Joaquin County Office ...	EDJOIN account fees 1 year...	Advertising	1,200.00
Check	02/13/2023	9630	Andrew Bays	MAINTENANCE HOURS IN...	Contracted Service	429.00
Check	02/13/2023	9631	North State Parent Magazine	INV 72923	Advertising	275.00
Check	02/13/2023	9632	Hernandez Cleaning Service	CUSTODIAL SERVICE INV ...	Contracted Service	4,500.00
Check	02/13/2023	EFT	Laura Swanson	BH COUNSELING - BOOKS	4200-Books/reference Materi...	42.58
Check	02/13/2023	dbt	USPS	mailings	Postage	11.93
Check	02/14/2023	DBT	Amazon.com	STICKERS FOR KIDS;	Instructional Supplies	9.64
Check	02/14/2023	DBT	Amazon.com	LITHIUM BATTERY 10 PACK	Office Supplies	6.42
Check	02/14/2023	ACH	COSTCO VISA CARD	2022 15TH PURCHASES JA...	SHERWOOD COSTCO VISA	167.15
Check	02/15/2023	9634	Advanced Document	INV92370	Copier Lease	472.26
Check	02/15/2023	EFT	PG & E	JAN 2023	Electricity	973.62
Check	02/16/2023	ACH	HP LEASE 7603	Lease Payment - Customer I...	HP DIRECT LEASE	316.21
Check	02/16/2023	DBT	LA COCINA	PBIS - SUMS MTSS - LCAP ...	LCAP	34.63
Check	02/16/2023	DBT	Amazon.com	BATTERIES	Office Supplies	37.11
Check	02/17/2023	DBT	Amazon.com	KEY LOCK BOX	Office Supplies	30.02
Check	02/21/2023	DBT	Wufoo	SERVICE - 2023 FEB	Online List Management	19.00
Check	02/21/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Conferences	100.00
Check	02/21/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Conferences	100.00
Check	02/21/2023	DBT	The Creative Apple	RED/BLUE 100 SHEET	Instructional Supplies	4.91
Check	02/21/2023	DBT	Amazon.com	STAPLERS	Instructional Supplies	22.50
Check	02/22/2023	DBT	BARNES & NOBLE BOOK...	THE VOICE IN OUR HEAD	4200-Books/reference Materi...	16.41
Check	02/22/2023	DBT	Amazon.com		Instructional Supplies	15.64
Check	02/23/2023	DBT	USPS		Postage	14.15
Check	02/23/2023	ACH	Verizon Wireless	SERVICE 2023 FEB	Telephone, Cellular	93.49
Check	02/23/2023	EFT	Laura Swanson	BH COUNSELING - BOOKS	4200-Books/reference Materi...	30.00
Check	02/23/2023	DBT	Amazon.com	MO PRIME FEE	Contracted Service	16.08
Check	02/23/2023	9635	Hernandez Cleaning Service	inv 0142 install keyboard	Contracted Service	100.00
Check	02/23/2023	9636	Marlo . Knox	Supplies	Instructional Supplies	163.58
Check	02/23/2023	9637	Maia Illa, LCSW	Supervision-Swanson INV 9	Contracted Service	240.00
Check	02/23/2023	9638	Comcast Ethernet	Service-2742 2023 FEB	Ethernet - Fiberoptic	2,594.61
Check	02/23/2023	EFT	Comcast Business 9110	SERVICE 2023 JAN-FEB	Internet Service Provider	187.87
Check	02/23/2023	DBT	Amazon.com		Instructional Supplies	15.00
Check	02/24/2023	DBT	Office Depot	SUPPLIES	Office Supplies	272.32
Check	02/24/2023	9617	Chico Country Day	NATALIE WREN - NURSE -I...	Contracted Service	1,291.91
Check	02/27/2023	DBT	Chico Area Recreation & P...	LAKESIDE PAVILLION - SP...	Other Rentals	50.00
Check	02/27/2023	DBT	Amazon.com		Instructional Supplies	102.24
Check	02/27/2023	9639	P65 IT LLC	WIRELESS ACCESS POINTS	5900-Communications	10,163.22
Check	02/27/2023	9640	PARK AVENUE PEST CO...	INV 587527	Pest Control	85.00
Check	02/28/2023	7443	Jillian Mansfield	SEPT-OCT 2022 SUB CON...	Contracted Service	207.00
Check	02/28/2023	DBT	Costco	SNACKS-SUPPLIES	Extended Day	363.25
Check	02/28/2023	DBT	Costco	SUPPLIES	Office Supplies	137.28
Check	02/28/2023	EFT	Pat Casey	CONTRACT SERVICE - INV...	Business Manager Services	4,400.00
Check	02/28/2023	DBT	Amazon.com		Instructional Supplies	33.22

Type	Date	Num	Name	Memo	Account	Amount
Check	02/28/2023			Service Charge	Bank Fees	27.00
TOTAL						**46,929.57**

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Heather Fisher, Administrative Assistant

Subject: **SMPO Report**

Date: March 23, 2023

Sherwood school events both bring families together and can raise funds for the school as well. In February, one of our team members created a promotional flier for Sherwoods' annual Cal Skate night which was both a social event, a fundraiser, and a Board meeting to boot! Flyers were posted on campus and in the community. Cal Skate Night has been an annual event for years and was once again a fun night for the students and families to socialize outside of school.

At the end of March the SMPO is sponsoring a Spring Formal Family Ball. This event will give students an opportunity to dress in formal attire and dance! Formal attire donations are being gathered for students who may not have the perfect outfit for the evening. The SMPO has reserved the Dorothy Johnson Center for the event and is in the process of organizing food, volunteers, decorations and a DJ!

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Second Interim Budget**

Date: March 23, 2023

SUMMARY

Business Manager Pat Casey has prepared the Second Interim Financial Report with input from the Budget Committee.

DISCUSSION

The Budget Committee met and gave input to adjust the budget to actual spending. The Second Interim Report reflects adjustments made considering spending patterns to project out for the remainder of the year.

ACTION REQUESTED

Adopt 2nd Interim Budget.

Attachment: 2nd Interim Budget

2022-23 3/23/2023 BD MTG 2ND INTERIM	FUNDING AT 100 ADA 2022-23 1st INTERIM BUDGET	FUNDING AT 91 ADA 2022-23 2ND INTERIM BUDGET	CHANGE		
Revenue					
8011 Local Control Funding	509,801	460,007			
8012 Education Protection Act	269,246	264,108			
8019 Prior Year Overpaid Adjustment		(57,778)			
8096 In Lieu Taxes	318,000	302,346			
Subtotal LCFF Revenues	***1,097,047***	***968,683***	***(128,364)***		
8290 - TITLE I + ESSER TOTAL	**200,000**	**222,180**	22,180		
8181 - Spec. Educ.- SELPA Fed	2,000	-	(2,000)		
8311 - Spec. Educ. - SELPA State	80,000	68,000	(12,000)		
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	***50,000***	***8,987***	(41,013)		
8590 - ELOG-P	***40,000***	***54,280***	14,280		
8590 - PRE-K PLAN-IMPLEMENT	***25,000***	***29,108***			
8590 - AMIM	***65,000***	***33,787***			
8590 - LREBG		***144,700***			
8699 Other Local Revenue	3,000	3,000	-		
TOTAL REVENUES	**1,597,547**	**1,568,225**	***(146,917)***		
Expense					
1000 Certificated Salaries	584,880	584,880	-		31%
2000 Classified Salaries	615,201	615,201	-		32%
3000 Employee Benefits	347,156	330,037	(17,119)		17%
SUBTOTAL	***1,547,237***	***1,530,118***	(17,119)		80%
4100 Texts and Core Curricula	500	500	-		
4200 Reference Materials	8,000	8,000	-		
4300 Materials and Supplies	36,000	33,000	(3,000)		
4400 NonCap Equipment	-	-	-		
4700 Food (Nutrition)	8,000	3,000	(5,000)		
SUBTOTAL	***52,500***	***44,500***	(8,000)		2%
5200 Travel and Conferences	3,000	3,000	-		
5300 Dues and Memberships	1,700	2,900	1,200		
5400 Property/Liability Insurance	38,000	36,000	(2,000)		
5500 Operations / Housekeeping	103,200	108,200	5,000		
5600 Rentals, Leases, and Repairs	12,500	11,700	(800)		
5800 Prof. & Consulting Services	159,700	157,400	(2,300)		**4%**
5900 Communications	12,700	15,400	2,700		
SUBTOTAL	***330,800***	***334,600***	3,800		18%
6200 CAPITAL OUTLAY- BLDG			-		
TOTAL EXPENDITURES	**1,930,537**	**1,909,218**	**(21,319)**		100%
Net Income	***(332,990)***	***(340,993)***	**ADA Equiv.**	**-34**	
Unassigned/Unappropriated - Prior Year	**550,888**	**785,132**			
Unassigned/Unappropriated - Proj. Yr End	**217,898**	**444,139**	**ADA Equiv.**	**44**	
Reserve - Economic Uncertainties	**120,000**	**120,000**	**Est. 1 mos. salary/benes.**		
Total - Unassigned/Economic Uncertainty	**97,898**	**86,662**	**ADA Equiv.**	**9**	
Legally Restricted- Land Value+HVAC/Fixtures (Audit)		**237,477**			

SHERWOOD MONTESSORI

REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS

Physical Address of Meeting: 1017 E. 16th Street Room 3
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)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, April 20, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

B. CONSENT AGENDA (6:05 p.m.)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, March 23, 2023.
B.2 Middle School Field Trip Consider approval of field trip to Shakespeare Festival in Ashland, Oregon

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 Board Report

E.3 Action Items (6:40)

None

E.4 Board Governance (6:45)

E.4.1 Elections Committee Update The Elections Committee will update the Board on recruitment efforts.

E.4.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

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

Physical Address of Meeting: 1017 E. 16th Street Room 3 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)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, March 23, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

Russell called meeting to order at 6:01 pm

A.1 Land Acknowledgement
Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, and Tina Hanson-Lewis present.

B. CONSENT AGENDA (6:05 p.m.)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, February 16, 2023.
B.2 Audit The Board is asked to accept the Independent Financial Audit for the 2021-2022 fiscal year.

Jolynn Aanenson motioned to approve; Tina Hanson-Lewis seconded. Unanimous approval.

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 School Director Report

Michelle Yezbick presented School Director Report

E.2.2 Treasurer Report

Pat Casey presented Treasurer Report

E.2.3 SMPO Report

Russell Shapiro and Michelle Yezbick both presented the SMPO Report

E.2.4 Board Report

E.3 Action Items (6:40)

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.

No input or corrections.

E.3.2 Adoption of Second Interim Budget

Consider adopting the Second Interim Budget.

Action Requested: Adopt budget.

Robyn Howley motioned to approve; Beth Hammer seconded. Unanimous approval

E.4 Board Governance (6:55)

E.4.1 Elections Committee Update The Elections Committee will update the Board on recruitment efforts.

Russell Shapiro presented an update on upcoming board elections plan.

E.4.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

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.

Board entered a closed session.

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)

Meeting adjourned at 7:07 pm.

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SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: Field Trip to Ashland

Date: April 20, 2023

SUMMARY

The Middle School class would like to take a 3 day (May 16-19, 2023) field trip to the Shakespeare Festival at Southern Oregon University in Ashland, Oregon.

DISCUSSION

Field Trips that involve a significant cost, a trip out of the state, or an overnight stay should be reviewed and approved by the Board of Directors

The middle school class would leave Sherwood on Tuesday, May 16, traveling by private vehicles to Ashland, Oregon. They will spend 4 days and 3 nights attending plays and workshops and exploring Ashland and the university campus. They will return to Sherwood on Friday, May 19th.

Costs for the trip will be covered by parents, fundraising, and funds designated in our 2022-2023 LCAP.

ACTION REQUESTED

Approve trip.

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Instructional Staff Report**

Date: April 20, 2023

Instructional Staff was asked to respond to the theme: How do you see a return to a state of normalcy?

Transitional Kindergarten/Kindergarten -Teresa Shippen

In our TK/K classroom, I have witnessed a slow and gradual return to normal. Most of the kids have been in my room since January 2022, and a few have been with me since the fall of 2021. Certainly, the wearing of masks was difficult, especially when trying to teach phonics and reading skills, and yet at this age their drive and desire to learn did not let masks stop their progress. Our students have been so resilient through these crazy times.

During the 21-22 school year they were just SO happy to be together and have a school experience with peers of their same age. Most of them came unprepared for the group setting, lacking some basic skills of being part of a group. Most of last year was spent on classroom expectations and building students who could succeed in a community setting. These are things that many students did not have an opportunity to practice. It was a challenging year as far as behaviors go, and we spent much time on these things, and less time on academics.

This year I have 10 returning students. The students who are new to us have had some preschool experience. They are more prepared, and this has brought the joy that comes after tough times! The students followed a much more normal pattern, normalizing within the first couple of months! This process allows a classroom to flow with independence, mentoring, and guided practice. The students genuinely are happy with this community we built. They are excited to learn and grow and practice their skills in our room. I am lucky to have had them for 1 1/2-2 years so that we could build on their strengths and all that we learned through our time together. I believe that we have made a return to "normalcy", although it took time and hard work. I have the added bonus that precious years of learning were not spent on Zoom, or 6 feet apart and wearing masks. I imagine these things are having a lingering effect on older students.

Next year I will begin again with a new group of students, save two returning TK students (my leaders!!). Given that their birth years will be 2018-2019, I am hopeful that they will not remember all the trauma of the Campfire, and that the pandemic will not have affected their preschool experiences. I know that these experiences will continue to affect their families, but I am hopeful that the students will not have the very real and strong effects from these traumas that we have seen in students over the past few school years. I am ever hopeful that our families are beginning to heal and that we can return to a state of normalcy in our youngest learners.

Transitional Kindergarten/Kindergarten -Adam Mankoski

I fear we have strayed a great distance from what I consider normal. Through a Primary lens, I see young people coming to my class who are traumatized, functionally dependent on their caregivers, overstimulated, hyperactive, and entitled. I feel that a return to normalcy will happen when we decide to invest in children in utero, with support and mentoring for struggling families. At a base level, we have societal resources to ensure that all children have safety and security. Yet, I have families struggling with homelessness, abandonment, and food insecurity. But in absence of true care for other humans, mentoring, that should extend into the Primary school years, should include nutrition education, child development and parenting support. Parents should be aware of the effects of environmental factors, including excessive sugar and other chemicals in our food, and the effects of gaming, movies, and other media, on a child's ability to concentrate and function. We tend to apply solutions like counseling and other behavior supports, without addressing the things that we have direct control over like diet, exercise and meaningful stimuli. I think we're often afraid to address these issues with parents. But until we do, I think we will continue to apply other solutions, with limited results.

1st/2nd/3rd -Kim Powers

I guess it would depend on what one considers "normal". I began my journey here at Sherwood during the pandemic when we were figuring out how to teach on Zoom, and then coming back to school for half days with 6 feet of social distancing and every student having all their own materials. We were doing daily health checks and only allowing materials to be used once per day and then cleaning everything at the end of each day. That was definitely not normal. I don't know what normal was like for Sherwood prior to that, so at this point I feel like we are "back to normal." Students can sit next to each other without fear that they will contract a deadly disease. They can talk to one another as they did before. We eat snack together and work in groups together. The kids are testing boundaries like they should be. I think a lot of social miscues we were seeing last year have resolved themselves with practice and social experience. I think the one area I find to be the least back to normal is attendance. I feel like parents don't take school as seriously as they did pre-covid, but maybe those are just the types of families we have at this school. I have one group of students in particular who were absent and tardy a lot last year, and that same pattern is occurring again this year for the same group of kids. This particular cohort came to me significantly behind in their academics and have had a really hard time catching up. I feel like once the attendance issue is under control and students have the opportunity to be a part of *all* the learning they have access to, it would be easy to say that we are back to operating and performing normally.

1st/2nd/3rd -Marlo Knox

This board report is written to answer the prompt our director shared with us; How do you see a return to a state of normalcy? Let's agree that by normalcy we mean being within certain limits that define the range of normal function of a lower elementary Montessori classroom. Furthermore, let us agree that Montessori is special. The approach to education is child focused. Students work individually as well as in groups utilizing special learning materials. The classroom engages deeply in work. Everyone respects themselves and others. The environment fosters rigorous growth cognitively, emotionally, socially, and physically because learners are self-

motivated. This is the basic explanation given by the American Montessori Society as they explain what Montessori is…exactly.
So are we there? Were we there? Can we get there?
I see a return to what was a slippery slope. All I have is now, this moment. I am always working towards the best we can be now, together. In my experience life does not happen backwards, it is always moving forward. I have to start with what I have now, at this moment, and grow from there. That being said, what has worked well before does influence the decisions I make about leading now. I have 34 years of experience in schools, teaching, guiding, and I draw on that in relation to the community I serve.
A return to a state of normalcy for me is a renewed dedication to Montessori education. To that end I utilize the following:

- Prioritize acceptance and value of each child, each person.
- Determine what our community needs through observation.
- Use the materials of the classroom over and over again.
- Avoid abandonment of tasks, focus on completion.
- Control group work to the exception of individual work or vice versa.
- Insist on an environment where everyone can learn, and everyone can teach.
- Acknowledge the importance of quiet and ensure movement is intentional.
- Emphasize the consideration of others by verbalizing it and modeling it.
- Respect is shown aloud and often and praised.
- Intentionally elect and support anything challenging.
- Use Interventions as a separate practice, requiring fidelity and consistency.

I hope my response is informative. It was a challenging topic but one I enjoyed considering. I hope that if anyone reading this has questions, comments, or concerns that they might come to me. I would honor the opportunity to discuss this topic further if necessary.

1st/2nd /3rd -Anne Adams

"Normalcy" is an interesting proposition, isn't it? Covid wasn't normal. Tiktok and Twitter are...if "normal," certainly new. Many aspects of our current lifestyle break the patterns set by centuries of humanity, and so far, the results are still pending in that experiment. "Normalcy" seems hard to get in our world right now, and I think schools are feeling that flux.

However! Montessori often spoke of "normal*ization*" as the process whereby children adapt to the classroom environment and start to exhibit ideal traits for learning—curiosity, concentration, satisfaction, etc.--and that's a topic I feel prepared to address, because over this school year, my students have (mostly) "normalized" in the Montessori way. Here's what we do that seems to work:

- We set expectations, and we stick to them. Using the school rules as a guide, we decide how materials should be handled, how others should be treated, how bodies and voices should be used, and how work should be done. When students don't meet the expectations, they get reminded of them. Reminder styles may vary, but expectations persist. Over time, kids get tired of testing this, and focus instead on learning.

- We also set and stick to routines. Using a daily schedule, we consistently devote large blocks of time to broad focuses. There's a time for receiving seated lessons, a time for independently studying featured topics, a time for math practice, and a time to choose whatever work you most prefer. There's a time in the afternoon especially for performing and crafting. Within this schedule, children can still choose a different experience each day, but the structure reassures them that they'll get a chance to do each activity without running out of time.
- Students perform voluntary weekly "jobs." The Supply Manager hands out the pencils and workbooks each morning, and the craft supplies each afternoon. The Editor checks each workbook after lunch to see that daily work goals are being met. The Lunch Manager writes down school lunch recipients and hands out their cards. The Librarian organizes books, and the Biologist organizes biology shelves and plant and animal specimens. Taking a hands-on role in the classroom gives students a great sense of responsibility, ownership, and pride. And when students are equally as accountable to their peers as they are to the teacher, they develop a real sense of community.
- We make each day intrinsically rewarding. In my experience, kids tend to act abnormal when rewards are external. Whether they aim to please or try to defy, they're not being themselves in these moments. The most important tools I give students are ways to sustain their own pleasant mood, through song, artistry, imagination, and work satisfaction. These are the "treats" that are offered and accessed in our class—and they're an endlessly replenish-able resource.

So in summary, "how do I see a return to a state of normalcy?" I see that time-tested Montessori techniques can normalize one classroom at a time.

4th /5th/6th -Jessi Lusardi

Overall, I think that school has returned to normal, but there are a few areas that we are still having challenges with. Sherwood has provided a lot of emotional and social support to students this year, but I think it would help to continue that support through the coming years. Covid school shutdowns had huge impacts on students' emotional wellbeing, and social skills. These two areas really are the drivers of academic progress in the classroom, and so the more social/emotional support we can give students, the more they will be able to learn and thrive in class. Some students are still figuring out how to interact with peers appropriately, and how to follow school rules and procedures. Many still have parents who are dealing with the economic or emotional effects of covid or covid shutdowns. Continued support is key.

We haven't yet returned to "normal" with our enrollment, and with some of our annual events (Sherwoodstock!), but I am sure it will happen next year. I'm looking forward to implementing some of the ideas we discussed on the enrollment committee.

4th /5th /6th-April Pearce

7th/8th-Michael Whittemore

I feel we have a new normal and we have to find ways to promote what we want to share in our

school community from the old norms while adjusting to the new perspectives. One thing I feel we could do to help with this is helping create more community with students in school as well as families. And try and have our school work with things to be more active in our bigger community around us.

Learning Center-Happy Yasko

I don't think this nation or this state and unfortunately this county and city will ever get back to what I once called "normal". The normalcy at school is one environment we may and must concentrate on. This will need to have teachers and staff to lead by example. We have the opportunity to create a new normalcy if we work together and support one another in this endeavor. This could be one occasion where a smaller group may have a better chance of actually influencing the journey to an even better normalcy. We need to create this environment and embrace this opportunity as a chance to start something new and great. "It starts with me", needs to be the attitude we have going into this.

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **School Director Report**

Date: April 20, 2023

Administrative

- Updated enrollment will be reported at the meeting.
- We've had a couple school tours since our last Board meeting. Interested parents can now use the website to send a message to request a tour.

Employees, Interns, and Independent Contractors

- We added two more teachers to our substitute teacher list.
- We are looking for a Speech and Language Pathologist and an Education Specialist for next year. We will also need a new Aftercare Coordinator before the end of this year and to cover the summer program.
- The classified staff had a Montessori materials workshop where they each presented a favorite material to the group.
- I presented a professional development on Positive Discipline for the teachers and some of our classified staff.
- I attended a professional development on human resources practices around hiring and employee onboarding.

Community

- The Spring Wonderland Family Ball was held at the Dorothy Johnson Center on March 31st. It was a fun community event and it raised $520 for SMPO events.

Safety

- We had our annual fire inspection and impressed our inspector with how on top of things we are.
- We are in a "low risk" flood zone. Floods are expected to affect 1 in 5 California schools this Spring.

SHERWOOD MONTESSORI

To: Board of Directors

From: Pat Casey, Business Manager

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

Date: April 20, 2023 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 March 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 528,227.38 as of March 31,2023 for the checking account.
- The expenses in March were for the normal operating cost.

Profit & Loss

- The March Profit & Loss report shows a Net Income of $ -246,297, which was offset by $63,332 of March LCF/EPA funds deposited in April 2023 along with $10,309 State/Fed Grant funds and $6,832 of Lottery allocation.

Cash Flow

- Assuming all State and Federally allocated funds are received and state aid is calculated on an Annual ADA of at least 91, the school is projected to end the year with a positive cash balance.

Sherwood Montessori
Profit & Loss YTD Comparison
July 2022 through March 2023

	Jul '22 - Mar 23
Ordinary Income/Expense	
Income	
8000-Revenues	1,194,539
Total Income	1,194,539
Gross Profit	1,194,539
Expense	
1000 Certificated Salaries	508,583
2000 Classified Salaries	349,890
3000-Employee Benefits	271,726
4000-Books and Supplies	38,400
5000 Services/Other Op. Exp.	272,264
Total Expense	1,440,863
Net Ordinary Income	-246,324
Net Income	**-246,324**

Sherwood Montessori
Board of Directors - Vendor Payments Report
March 2023

Type	Date	Num	Name	Memo	Account	Amount
Check	03/01/2023	DBT	CharterSAFE	BILLED PREMIUM - LIABIL...	5400-Liability Insura...	2,999.00
Check	03/01/2023	DBT	CharterSAFE	BILLED PREMIUM - WC 20...	3601-Workers Comp	749.00
Check	03/01/2023	ACH	Macquarie Equipment ...	Kyocera Copier Lease 202...	Copier Lease	220.94
Check	03/02/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Co...	100.00
Check	03/02/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Co...	25.00
Check	03/02/2023	9643	April Pearce	supplies	5200-Travel and Co...	26.66
Check	03/02/2023	9644	UPGRADED LIVING M...	AD IN GROWING UP CHICO	Advertising	200.00
Check	03/02/2023	9642	Chico Unified School D...	INV23-00114 FUA JAN	CUSD FUA Charges	2,525.68
Check	03/03/2023	EFT	Directional Ad-Vantage...	CHICO MALL KIOSK	Advertising	590.00
Check	03/03/2023	DBT	Amazon.com	NR	Instructional Supplies	21.40
Check	03/05/2023	DBT	Chico Area Recreation ...	LAKESIDE PAVILLION - S...	Other Rentals	462.00
Check	03/06/2023	DBT	Chico Area Recreation ...	CARD CREEKSIDE	Other Rentals	75.00
Check	03/06/2023	DBT	Chico Area Recreation ...	CARD CREEKSIDE	Other Rentals	75.00
Check	03/07/2023	7445	Adam Mankoski	SUPPLIES	Instructional Supplies	418.81
Check	03/07/2023	DBT	Western Psychological...	TAPS-4 TEST KIT	Instructional Supplies	100.15
Check	03/08/2023	9646	E-rate Advisors	INV - 1688 SECOND HALF...	Contracted Service	750.00
Check	03/08/2023	EFT	California Water Servic...	SERVICE 2023 JAN-FEB	Water	89.65
Check	03/08/2023	EFT	Comcast 4454	SERVICE - 2023 FEB-MAR	Internet Service Pro...	249.94
Check	03/10/2023	DBT	USPS	MAILINGS	Postage	24.50
Check	03/10/2023	DBT	Western Psychological...	TAPS-4 TEST KIT	Instructional Supplies	271.48
Check	03/10/2023	DBT	Pearson Education Inc.	GFTA-3 RECORD FORMS ...	Instructional Supplies	68.64
Check	03/10/2023	dbt	Amazon.com	tardy slip book	Office Supplies	112.42
Check	03/12/2023	DBT	Amazon.com	METAL ALPHABET	Office Supplies	24.10
Check	03/14/2023	ACH	HP LEASE 7603	Lease Payment - Customer...	HP DIRECT LEASE	316.21
Check	03/14/2023	ACH	COSTCO VISA CARD	2022 15TH PURCHASES F...	SHERWOOD COST...	217.00
Check	03/16/2023	9647	Advanced Document	CONTRACT CHARGE 202...	Copier Lease	403.10
Check	03/16/2023	9648	Hernandez Cleaning S...	SERVICE 2023 FEB	Contracted Service	5,000.00
Check	03/16/2023	EFT	Waste Management	SERVICE 2023 FEB	Trash/Recycling	133.76
Check	03/16/2023	9633	Chico Country Day	NATALIE WREN - NURSE ...	Contracted Service	1,291.91
Check	03/16/2023	9649	Chico Country Day	NATALIE WREN - NURSE ...	Contracted Service	235.26
Check	03/17/2023	DBT	Wufoo	SERVICE - 2023 MAR-APR	Online List Manage...	19.00
Check	03/20/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Co...	100.00
Check	03/20/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Co...	100.00
Check	03/20/2023	DBT	Johnny's Chico Lock a...	extra keys	Facility Repairs	117.99
Check	03/22/2023	EFT	Comcast Business 9110	SERVICE 2023 FEB-MAR	Internet Service Pro...	187.87
Check	03/22/2023	9650	Comcast Ethernet	Service-2742 2023 FEB	Ethernet - Fiberoptic	2,594.61
Check	03/22/2023	EFT	Harry Yasko	BATTERY HP15	Instructional Supplies	28.95
Check	03/22/2023	EFT	Michelle Yezbick	LODGING	5200-Travel and Co...	1,627.59
Check	03/22/2023	9651	North State Parent Ma...	AD DIRECTORY	Advertising	455.00
Check	03/22/2023	EFT	PG & E	2023 MARCH	Electricity	994.34
Check	03/22/2023	DBT	Amazon.com	BATHROOM DECAL	Custodial Supplies	2.67
Check	03/23/2023	DBT	Amazon.com	HEPA FILTER	Office Supplies	127.62
Check	03/23/2023	DBT	Verizon Wireless	2023 FEB-MAR	Telephone, Cellular	93.49
Check	03/26/2023	DBT	Amazon.com	MURS RADIO	Office Supplies	91.15
Check	03/26/2023	DBT	Amazon.com	POST IT NOTES	Office Supplies	19.29
Check	03/27/2023	DBT	Amazon.com	CHAIR SEAT COVER	Office Supplies	19.60
Check	03/27/2023	DBT	PANERA BREAD	UE PBIS	LCAP	59.96
Check	03/27/2023	DBT	Amazon.com	MEMBERSHIP	Instructional Supplies	16.08
Check	03/28/2023	DBT	Costco	SNACKS-SUPPLIES	Extended Day	548.94
Check	03/28/2023	DBT	Amazon.com	His Dark Materials - 3 books	4200-Books/referen...	15.97
Check	03/29/2023	EFT	Heather Fisher	T-BAR LUNCH	5200-Travel and Co...	90.16
Check	03/29/2023	9654	NORTH VALLEY TRE...	INV 30918 TREE AT 1010 ...	Contracted Service	3,300.00
Check	03/29/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Co...	100.00
Check	03/29/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Co...	100.00
Check	03/29/2023	DBT	Amazon.com	newsprint	Instructional Supplies	16.43
Check	03/29/2023	DBT	Amazon.com	newsprint	Instructional Supplies	16.43
Check	03/29/2023	DBT	Amazon.com	newsprint	Instructional Supplies	16.43
Check	03/29/2023	DBT	Amazon.com	newsprint	Instructional Supplies	16.43
Check	03/29/2023	DBT	USPS	MAILINGS	Postage	12.26
Check	03/30/2023	EFT	Pat Casey	INV 2022/23-9	Business Manager ...	4,400.00
Check	03/31/2023	DBT	Amazon.com	HOW DOES YOUR ENGIN...	Instructional Supplies	70.75
TOTAL						**33,135.62**

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Heather Fisher, Administrative Assistant

Subject: **SMPO Report**

Date: April 20, 2023

The SMPO had another successful event! The Spring Wonderland Family Formal Ball at the Dorothy Johnson Center was attended by students and their families. It was fun to see students arrive dressed up with big smiles on their faces. The DJ did a great job of music and lights and the balloons that covered the ground were a big hit. Pizza, cookies and drinks were sold as well. A total of $520.00 was raised to help cover the cost of the venue and DJ.

At the end of April, the SMPO will sponsor the Annual Sherwood Variety Show. Students are given the opportunity to showcase their special talents that have included singing, gymnastics, jokes, magic tricks, music etc.

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 18, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

B. CONSENT AGENDA (6:05)

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.1 Minutes Approval Consider approval of minutes from Regular Meeting, April 20, 2023.

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 School Director Report
E.2.2 Treasurer Report
E.2.3 SMPO Report
E.2.4 Board Report

E.3 Action and Discussion Items (6:30)

E.3.1 Local Control Accountability Plan (LCAP)

The Board will be asked to discuss the LCAP and allow for public input.

Action Requested: Discuss plan.

E.3.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019) Chapter 6.

F. CLOSED SESSION (7:00)

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 (7:25)

The Board will be asked to adopt the 2023-2024 Local Control Accountability Plan (LCAP) and approve the Original Budget for 2023-2024.

H. ADJOURNMENT (7:30)

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

Physical Address of Meeting: 1017 E. 16th Street Room 3 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)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, April 20, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.) *Meeting called to order at 6:04 pm*

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

Russell Shapiro, Jolynn Aanenson, Tina Hanson-Lewis, Robyn Howley, and Beth Hammer present.

B. CONSENT AGENDA (6:05 p.m.)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, March 23, 2023.

B.2 Middle School Field Trip Consider approval of field trip to Shakespeare Festival in Ashland, Oregon

Robyn Howley motioned to approve consent agenda. Jolynn Aanenson seconded. Unanimous approval of consent agenda.

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**	*Russell Shapiro presented*
E.2.2	**School Director Report**	*Michelle Yezbick presented*
E.2.3	**Treasurer Report**	*Pat Casey presented*
E.2.4	**SMPO Report**	*Russell Shapiro presented*
E.2.5	**Board Report**	*Merged with Elections committee report*

E.3 Action Items (6:40)

None

E.4 Board Governance (6:45)

E.4.1 Elections Committee Update The Elections Committee will update the Board on recruitment efforts.

Russell Shapiro discussed upcoming board elections.

E.4.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019).

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.

The Board did not hold a closed session.

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)

Meeting adjourned at 6:50 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 18, 2023

Administrative

- Updated enrollment will be reported at the meeting.
- We had a TK/Kindergarten Open House on May 4th with a group of parents and children who will attend next year. Parents took the opportunity to meet the teachers and director and see the classrooms and 1010 campus.
- Our Intent to Enroll report was submitted to CUSD on April 28th with a 125-student count. CUSD asked us to present the report in a different format and indicate which students were out of district.
- We are finishing up required state assessments with students.

Employees, Interns, and Independent Contractors

- We have completed hiring for our next school year, except for one speech and language pathologist needed for 40% full-time-equivalency. We are partnering with Blue Oak for the other 60%. Both schools have backup plans to hire contracted services if we are unable to hire a person to share.
- The classified staff had a Positive Discipline workshop and a follow-up training to further explore strategies to manage difficult student behaviors.

Legislations

- SB 739, if passed, would extend charter renewal for another two years. Author Senator Marie Alvarado-Gil (D-Jackson) authored the bill, which has the support of California Charter Schools Association.

Community

- The Variety Show was held on April 28th, outside at 1010 Cleveland. The event featured the many talents of our students and refreshments were available to purchase.
- Sherwood participated in Butte Environmental Council's Endangered Earth Event and the students showed off their beautiful puppets in the march through downtown Chico.

SHERWOOD MONTESSORI

To: Board of Directors

From: Pat Casey, Business Manager

Subject: **Treasurer's Report**

Date: May 18, 2023 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 April 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 467,465.14 as of April 30,2023 for the checking account.
- The expenses in April were for the normal operating cost.

Profit & Loss

- The January Profit & Loss report shows a Net Income of $ -337,935, which was offset by $ 22,003 of April LCF funds deposited in May 2023 along $ 10,309 of State ELOP and $ 72,349 of Learning Recovery Emergency Block Grant funds. The Charter School Declining Enrollment Relief funds of $ 426,106 were also received. Very good news and a long wait.

Cash Flow

- The school will end the year with a positive cash balance.

Sherwood Montessori
Profit & Loss YTD Comparison
July 1, 2022 through May 15, 2023

	Jul 1, '22 - May 15, 23
Ordinary Income/Expense	
Income	
8000-Revenues	1,304,823
Total Income	1,304,823
Gross Profit	1,304,823
Expense	
1000 Certificated Salaries	571,775
2000 Classified Salaries	399,140
3000-Employee Benefits	304,466
4000-Books and Supplies	41,082
5000 Services/Other Op. Exp.	326,295
Total Expense	1,642,758
Net Ordinary Income	-337,935
Net Income	**-337,935**

Sherwood Montessori
Board of Directors - Vendor Payments Report
July 2022

Type	Date	Num	Name	Memo	Account	Amount
Check	07/02/2022	DBT	Target	BIKE LOCK	Maintenance Supplies	23.58
Check	07/05/2022	DBT	Facebook Ads	AD - RM	Advertising	15.00
Check	07/07/2022	ACH	CharterSAFE	P&L PREMIUM 8 - 22/23 DE...	5400-Liability Insurance	8,999.00
Check	07/07/2022	ACH	CharterSAFE	P&L PREMIUM 8 - 22/23 DE...	3601-Workers Comp	2,245.00
Check	07/07/2022	ACH	CharterSAFE	COVID REBATE	3601-Workers Comp	-1,799.00
Check	07/07/2022	DBT	Facebook Ads	AD - RM	Advertising	15.00
Check	07/10/2022	9463	Comcast Ethernet	Service-2742 2022 JULY	Ethernet - Fiberoptic	278.04
Check	07/11/2022	DBT	Amazon.com	TV WALL MOUNT - JESSIE	Instructional Supplies	42.57
Check	07/12/2022	EFT	Comcast 4454	SERVICE - JUNE/JULY 2022	Internet Service Provider	228.41
Check	07/12/2022	DBT	Amazon.com	FILE FOLDERS	Office Supplies	16.52
Check	07/12/2022	DBT	Safeway	SUMMER CAMP FOOD	Food (Instructional)	36.41
Check	07/12/2022	DBT	Chico Pet Works & Pet Stat...	MARLO - KING KRILL	Instructional Supplies	26.80
Check	07/12/2022	DBT	Growing up Chico	Business card ad	Advertising	200.00
Check	07/14/2022	DBT	HP LEASE 7603	Lease Payment - Customer I...	HP DIRECT LEASE	316.21
Check	07/14/2022	9478	Hernandez Cleaning Service	INV 47673	Housekeeping Services	1,900.00
Check	07/14/2022	9479	CatapultK12	2022-23 Website hosting	Website, Hosting	1,188.00
Check	07/14/2022	9480	Velazquez Flying Carpet Man	Carpet cleaning - INV 681	Housekeeping Services	1,360.00
Check	07/14/2022	9481	North State Parent Magazine	INV 72421 DIRECTOR-AD	Advertising	435.00
Check	07/14/2022	9482	SchoolWise Technologies	INV 2704- TECH/WEB/REG/...	Contracted Service	3,000.00
Check	07/15/2022	DBT	Lowe's	PAINT FOR RAMPS	Maintenance Supplies	221.75
Check	07/15/2022	9468	Macquarie Equipment Capit...	Kyocera Copier Lease JULY	Copier Lease	220.94
Check	07/15/2022	DBT	Facebook Ads	AD - RM	Advertising	25.00
Check	07/18/2022	DBT	Facebook Ads	AD - RM	Advertising	4.74
Check	07/18/2022	DBT	Wufoo	SERVICE JULY	Online List Management	19.00
Check	07/20/2022	EFT	Comcast Business 9110	SERVICE 2022 AUG-JUL	Internet Service Provider	162.38
Check	07/20/2022	EFT	Verizon Wireless	SERVICE 2022 JULY	Telephone, Cellular	192.04
Check	07/21/2022	DBT	Costco	Snacks	Food (Instructional)	310.83
Check	07/25/2022	9487	Comcast Ethernet	JULY Service-2742	Ethernet - Fiberoptic	1,489.86
Check	07/25/2022	9488	Andrew Bays	Landscape materials - CONT...	Maintenance Supplies	433.56
Check	07/25/2022	9489	California Charter Schools ...	22/23 DUES	5300-Dues and Membership	1,325.00
Check	07/25/2022	DBT	Amazon.com	PRIME MO FEE	Instructional Supplies	16.08
Check	07/26/2022	DBT	Target	SUPPLIES	Office Supplies	449.29
Check	07/26/2022	DBT	Amazon.com	TV STAND - JESSI	Instructional Supplies	32.71
Check	07/26/2022	DBT	Facebook Ads	AD - RM	Advertising	35.00
Check	07/27/2022	EFT	Pat Casey	CONTRACT SERVICE INVO...	Business Manager Services	4,400.00
Check	07/27/2022	9491	Andrew Bays	Landscape hours - CONTRA...	Contracted Service	1,449.00
Check	07/27/2022	9493	Macquarie Equipment Capit...	Kyocera Copier Lease JULY ...	Copier Lease	220.94
Check	07/27/2022	DBT	Amazon.com	SUPPLIES	Instructional Supplies	32.16
Check	07/28/2022	DBT	USPS	STAMPS	Postage	60.00
Check	07/31/2022			Service Charge	Bank Fees	27.00
TOTAL						**29,653.82**

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Heather Fisher, Administrative Assistant

Subject: **SMPO Report**

Date: May 18, 2023

The SMPO was happy to sponsor the annual Variety Show. We successfully held the Variety Show on our 1010 campus for the second year in a row! SMPO members set up before the show and cleaned after. Students performed songs, dances, skits, and other talents. Along with entertainment, students and parents were able to purchase pizza, juice, or cookies during the show. Funds raised from concession sales went to the Teacher Appreciation celebration on May 9th.



For Teacher Appreciation we hosted a taco bar from La Cocina Economica. The teachers were honored and all staff were included in the delicious luncheon. Signs were made in appreciation and there were smiles all around! Thank you, teachers!!

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Local Control Accountability Plan (LCAP) Public Hearing**

Date: May 18, 2023

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, and data was presented at a staff meeting. Including the LCAP as an item at our public meetings is also a required part of the adoption process to give opportunity for educational partner input. Sherwood requests input from parents and guardians, teachers, and staff via an annual Community Survey. Students give input with a Student Survey.

ACTION REQUESTED

Discuss LCAP and allow educational partners' input.

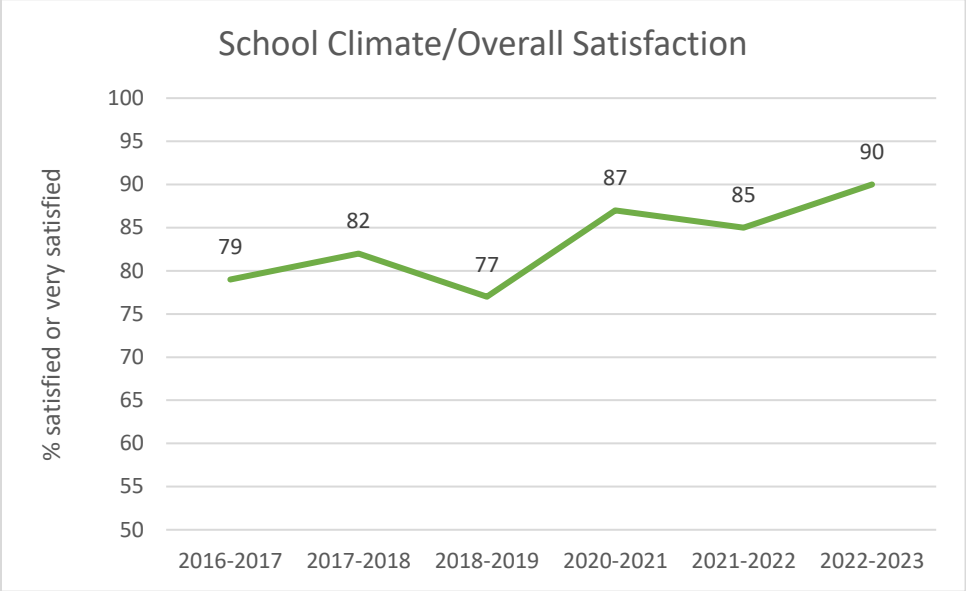
Attachments: LCAP Community Survey Report 2023, Progress on LCAP Goals Summary

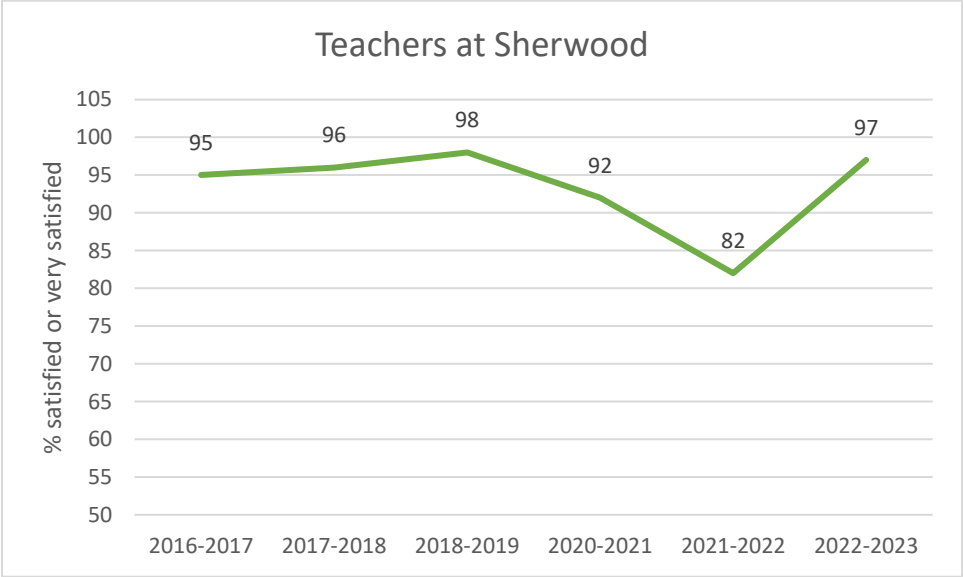
LCAP Community Survey 2023

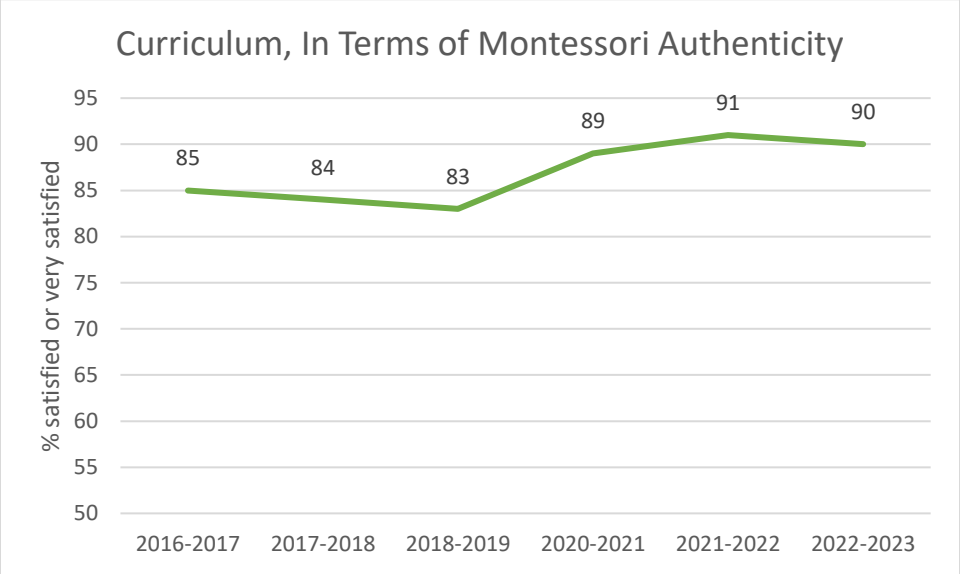
SURVEY RESULTS AND MULTI-YEAR COMPARISON DATA

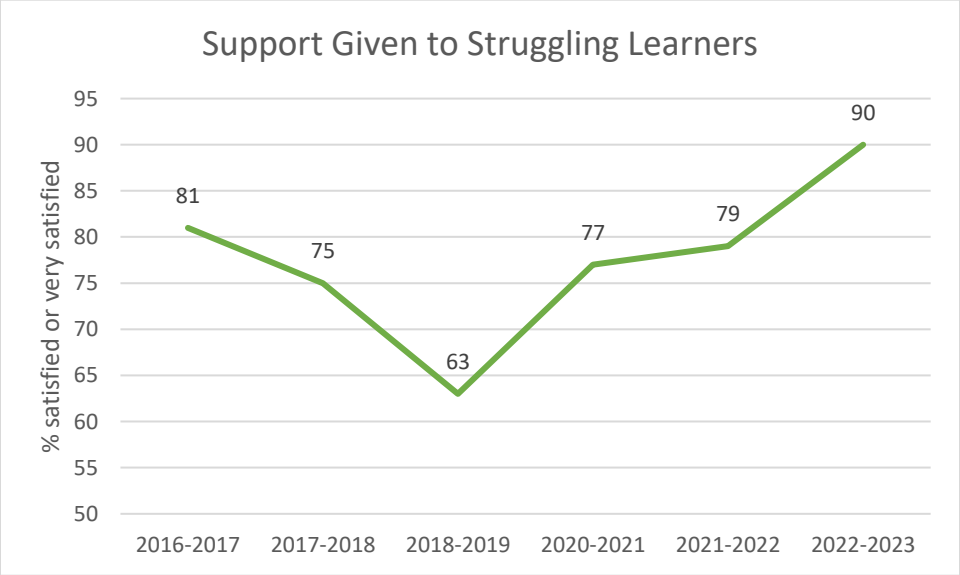
Michelle Yezbick ⌘ Director, Sherwood Montessori ⌘ May 18, 2023

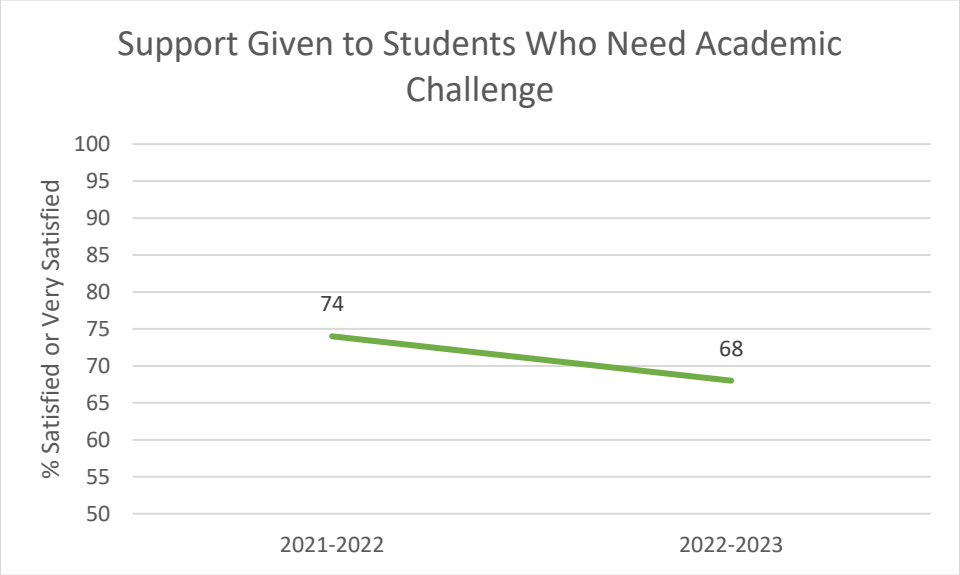
Community Survey Multi-Year Comparison Graphs

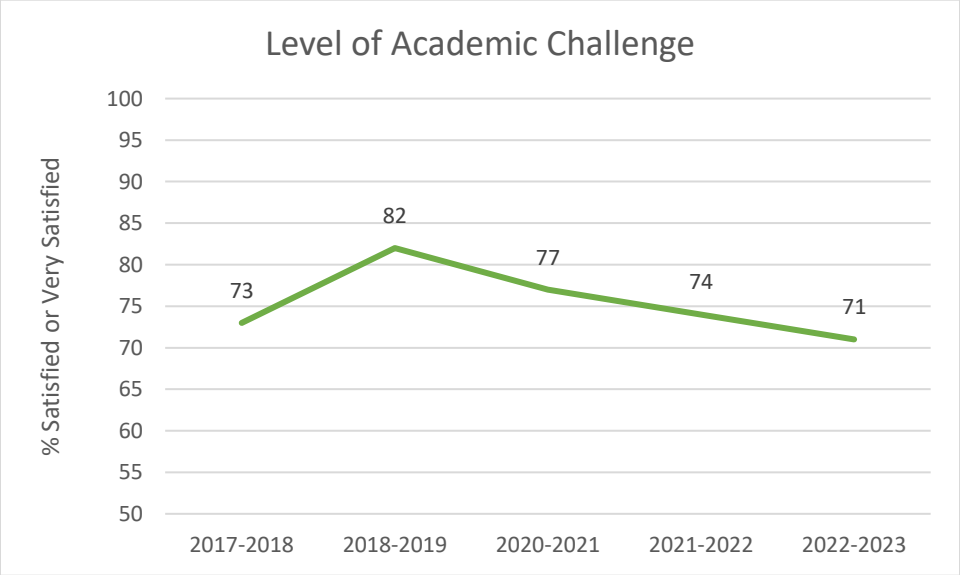


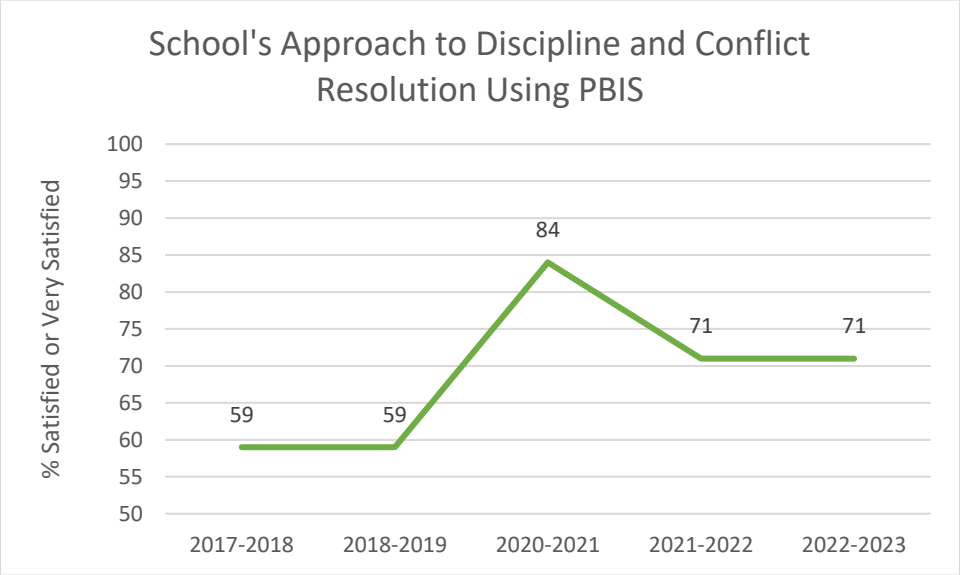


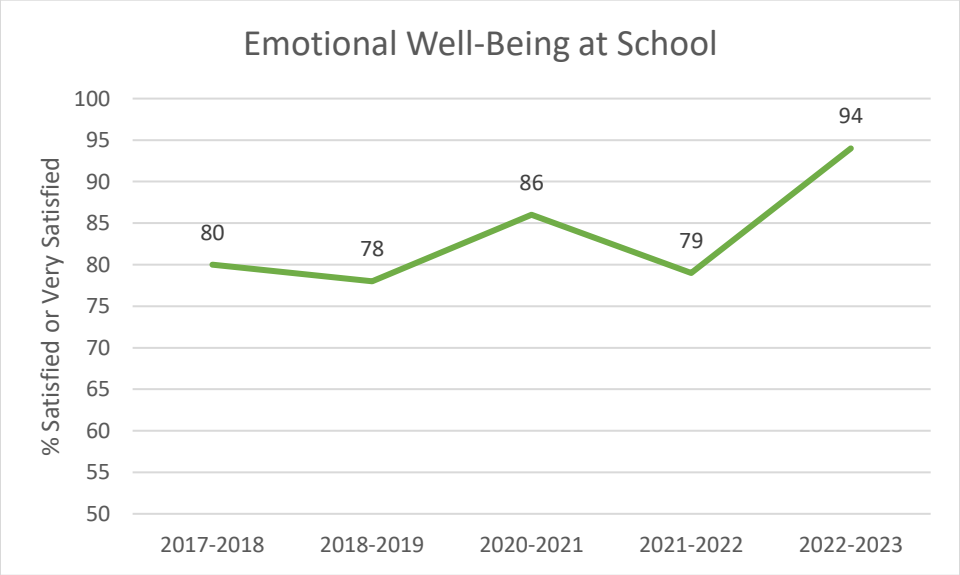

Curriculum, In Terms of Montessori Authenticity
% satisfied or very satisfied
95
90
85
80
75
70
65
60
55
50
85
84
83
89
91
90
2016-2017
2017-2018
2018-2019
2020-2021
2021-2022
2022-2023


Support Given to Struggling Learners
% satisfied or very satisfied
95
90
85
80
75
70
65
60
55
50
81
75
63
77
79
90
2016-2017
2017-2018
2018-2019
2020-2021
2021-2022
2022-2023

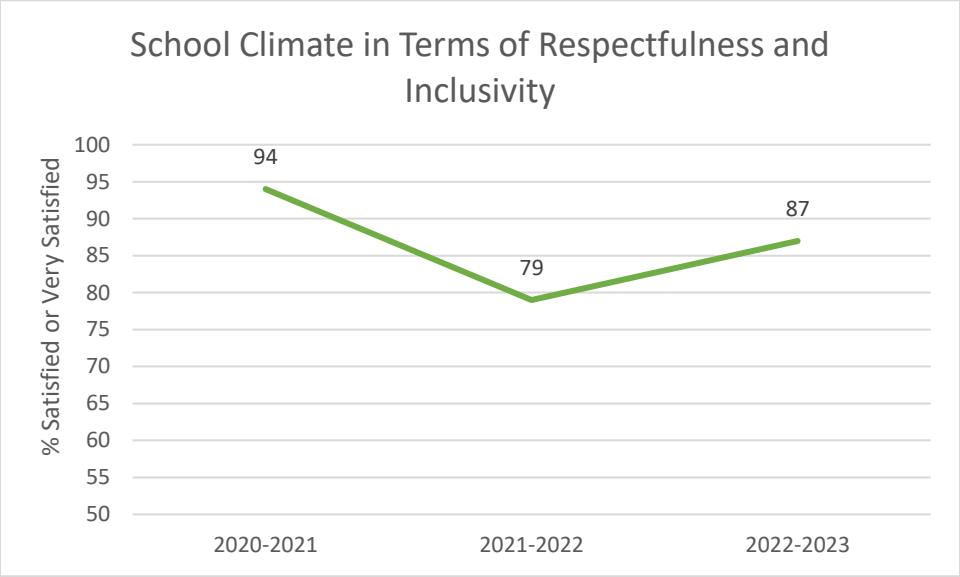

Support Given to Students Who Need Academic Challenge
% Satisfied or Very Satisfied
100
95
90
85
80
75
70
65
60
55
50
74
68
2021-2022
2022-2023

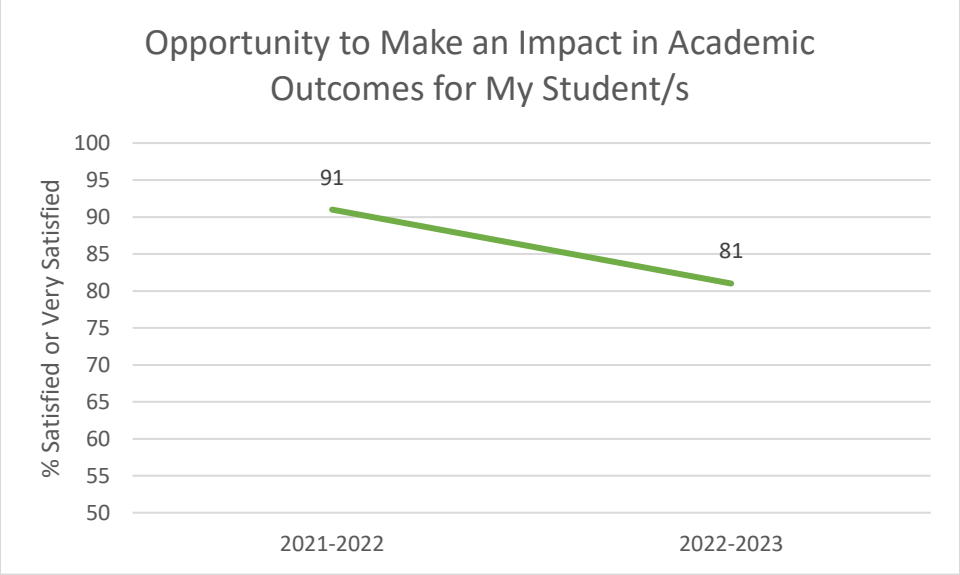

Level of Academic Challenge
% Satisfied or Very Satisfied
100
95
90
85
80
75
70
65
60
55
50
73
82
77
74
71
2017-2018
2018-2019
2020-2021
2021-2022
2022-2023

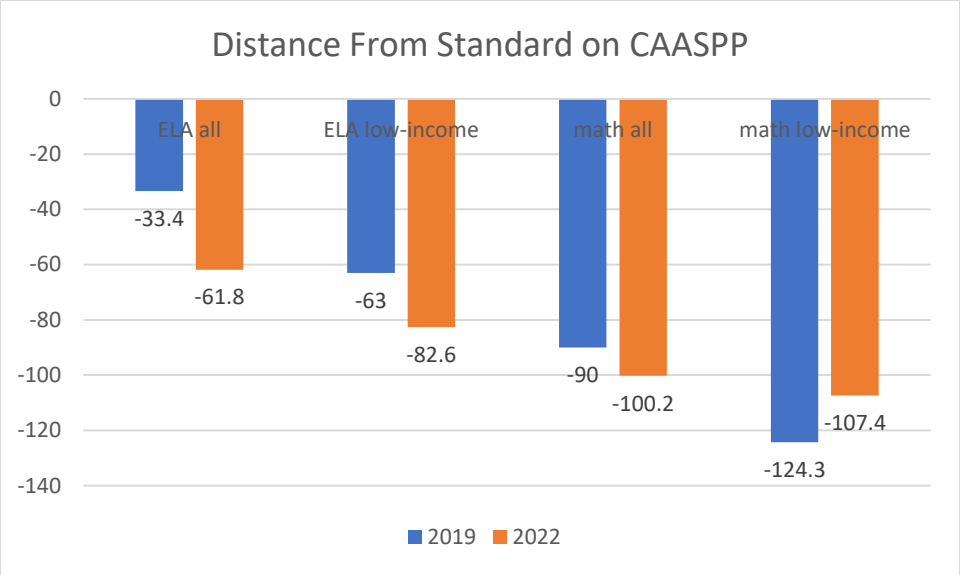

School's Approach to Discipline and Conflict Resolution Using PBIS
% Satisfied or Very Satisfied
100
95
90
85
80
75
70
65
60
55
50
59
59
84
71
71
2017-2018
2018-2019
2020-2021
2021-2022
2022-2023


Emotional Well-Being at School
% Satisfied or Very Satisfied
100
95
90
85
80
75
70
65
60
55
50
80
78
86
79
94
2017-2018
2018-2019
2020-2021
2021-2022
2022-2023

Note: 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.*







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?

11 responses were “yes”, 1 response was “no”.
Other responses:

I bring them to Admin.
administration
I do my best to be positive, however there are plenty of opportunities with room for improvement; communication being the first
I have already & my concerns were addressed.
I feel very comfortable talking to any staff member.
Yes, to the teacher first
Teacher

If you answered no to the preceding question, what could we do to make you feel more comfortable voicing your concerns?

I have always been able to speak my mind with admin. I appreciated that aspect of my job.

Take action on known issues. I have no faith that complaints are taken seriously.

Actually feeling like someone is really hearing me when I voice my concerns and that you actually care about how i feel and how you are impacting/ or impeding my childs learning experience

We are always open to improving our program. Do you have any suggestions for ways the school could improve?

More collaboration between the same grades teachers. Finding ways to be better prepared when unforeseen events leave us very short handed. Cross training including substitutes to fill voids quickly when there is no notice of absenteeism.

Recruitment seems to be an area for improvement for Sherwood. Have we tried reaching out to pediatricians, kids haircut places, educational toy stores, etc. I've seen flyers etc at some of these locations for other schools. It could help bring in more new students if we get our schools name in front of parent who want to invest in their children's development.

Provide more support and direction regarding IEPs and other support for students with disabilities/learning difficulties.

No

Could outdoor lunch be an option? My child has a hard time with noise and crowding in the cafeteria.

Be more proactive

Improve accessibility. There aren't always places for those of us with limited mobility to sit when needed.
Additionally, is there any way to improve security at the gate that goes in/out of the TK and Kinder area?
Also, should be a landlines that makes it possible to get in touch with the after care teachers in case of emergency. Several times I've tried calling through the office to have a message given to my student and it was not delivered.

More art outside

More focus on physical activity would be great (like dance, gymnastics, hiking club, mountain biking?).

For any "less than satisfied" responses, can you please explain why?

We have had a huge jump in emotionally challenged students due to the craziest 4+ years that I have ever been a witness to in Butte County. We like all schools were not and I believe are still not there.

A lot it this depends on the teacher. Some teachers are Montessori educated, while others are only Montessori certified. Meaning that some teachers only have basic Montessori training and while they try their best they don't represent the best Montessori has to offer.

Any 3 response would be in regard to how complicated and frustrating the process has been to get an IEP in place when it should be easier to do.
Intervention should be promptly addressed when it comes to my child/ a child falling behind on academic levels

Some of them I marked a 3 as being neutral bc it doesn't have an impact on my or my student. For questions 8, 9, 10, I can write a more detailed response at a later date if you'd like.

Exit Survey Responses 2022-2023

Three online surveys were filled. One respondent indicated concerns about safety and being able to keep contagious disease away from the infant in the family. Another respondent had moved out of town and was changing to a school that had a bus service but said that we were the best school in all of Chico. A third respondent was changing to a school with a more structured learning environment citing the child's struggle with attention. Two respondents mentioned appreciating the enrichment classes.

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.

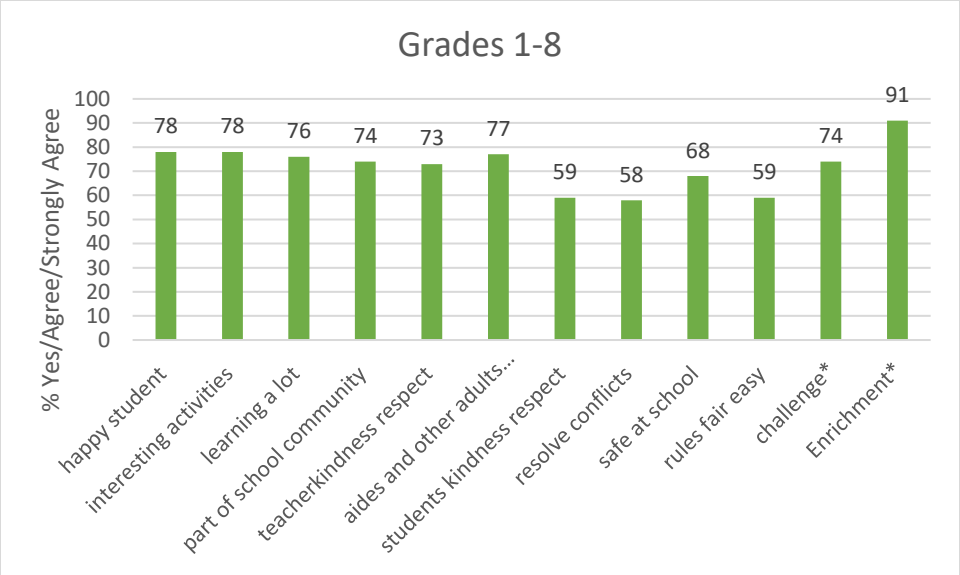
9. I feel safe at school.

10. The school rules are fair and easy to understand.

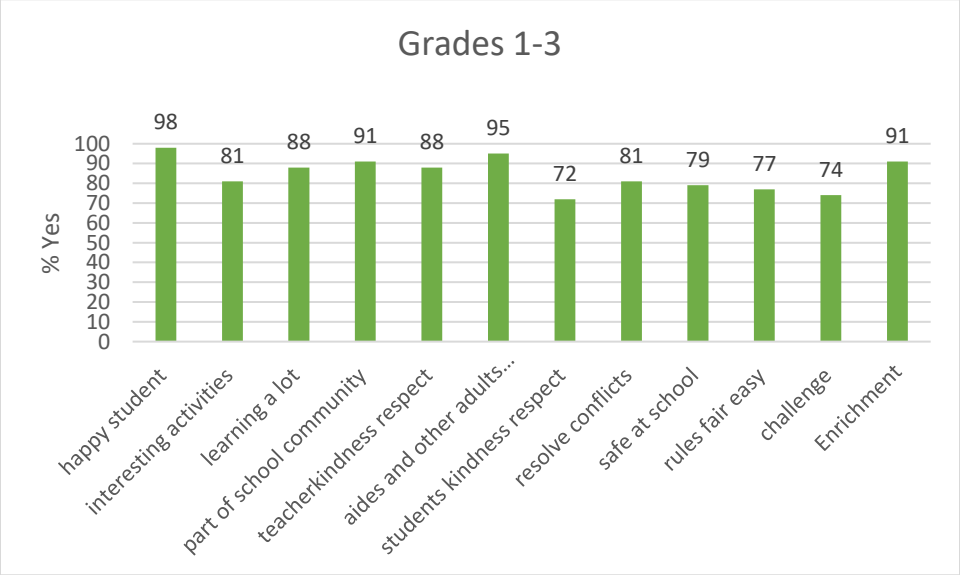
11. My work has the right amount of challenge.*

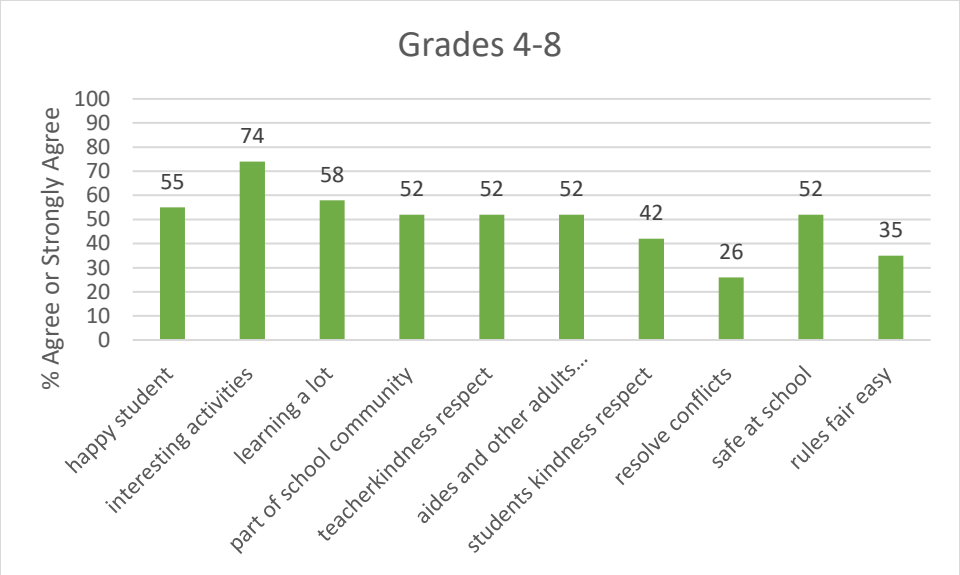
12. I have enjoyed having Enrichment classes (when I go to another teacher's class on Tuesday and Wednesday afternoons).*

*These questions were asked of grades 1-3 only.



*Responses to these questions were collected from 1-3 grades.




Grades 4-8
% Agree or Strongly Agree
100
90
80
70
60
50
40
30
20
10
0
55
74
58
52
52
52
42
26
52
35
happy student
interesting activities
learning a lot
part of school community
teacherkindness respect
aides and other adults...
students kindness respect
resolve conflicts
safe at school
rules fair easy

Sherwood Montessori LCAP Progress 2022-2023 Preparing for 2023-2024 Goals Revisions

Goal	Difference/improvement	Metrics	Expenditures	Rationale for potential changes
Goal 1.1: Provide highly qualified teachers for all students.	Maintained 100% highly qualified credentialed teachers.	Credentials – CALPADS, annual Credential Report	$1,500 budgeted classified salaries & benefits *Actual spending higher than planned due to 5% increase for all employees*	Goal was accomplished, so there will be no suggested changes. *May want to increase spending to attract talent to vacancies.*
Goal 1.2: Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS).	Provided professional development for implementing CCSS and the Montessori method.	CCSS Training: Pro. Dev. Attendance CAASPP results *Add growth data from STAR Renaissance*	$26,980 budgeted certificated and classified salaries & benefits (increased by $10,300 from prior year) *Anticipating fewer employees, may lower*	CAASPP scores increased overall from 2021 to 2022, but not as much as we would have wanted to see, although growth data indicated over a year's growth in ELA and math. Scores were impacted by student behavior. Need 2023 to see the impact of smaller class sizes and student behavior support. Prior year funding based actual spending in 21-22, which was supplemented by Covid relief funds.
Goal 1.3: Provide a broad range of Montessori materials.	Maintained materials in good repair and will replace/add to materials as needed.	Montessori materials purchase invoices; inventories	$4,587 budgeted (cost of Dream Package at time of LCAP development)	We still have several closets filled with donated materials. New materials for the TK/K classroom were ordered as a set, but only pieces arrived. A reimbursement was received too late in the year to be used for the current year's students. One fewer lower elementary classroom means more materials will need to be stored, could spend less for new TK/K classroom's remaining needed materials.

Sherwood Montessori LCAP Progress 2022-2023 Preparing for 2023-2024 Goals Revisions

Goal	Difference/improvement	Metrics	Expenditures	Rationale for potential changes
Goal 1.4: Provide a facility in good repair and maintain recess equipment.	Bathrooms were refurbished and a new playground was installed at 1010 Cleveland Ave.	Facilities Inspection Tool, records of recess equipment order, Sherwood Community Survey results	$14,700 budgeted; Directors salary and benefits, teachers salaries and benefits; contractor for playground installation; Measure K funds for facility	The summer move was extensive and spending exceeded plans, but not on materials. Smaller order needed for equipment as PE shed was well-stocked. Bathrooms were refurbished.
Goal 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.	Director took over administration of process, return of the roving sub for meetings. Many more meetings were held than had previously been held.	Community Survey results *SWIS data was not indicated as a metric for this goal, but is relevant and does show an improvement in behavior from kids who need Tier 2 (SST, counseling) and Tier 3 (IEP) services*	$130,963 salaries and benefits for Director's and teachers' time for meetings, roving sub, behavior support staff *Need to decrease due to small enrollment, Covid relief funds ending*	Had increased from planned $48,200 in 21-22 school year, which was for portion of Director of MTSS salary. Director of MTSS spent more time supporting students with behavior challenges and was left with little time to spend on SST process. Restructured with behavior support specialist and put SST process back to School Director's job duties *Need to see Community Survey results to assess impact*
Goal 2.1: Ensure that parents understand the ways the school communicates with students' families.	Parent Square will indicate that all parents are contactable.	Parent Square contact data	$4,600 Parent Square App	100% of parents are contactable.
Goal 2.2: Ensure that parents understand the nature of the Montessori method of education.	Parent attendance will reflect an increase in the number of parents accessing these opportunities.	Parent education attendance	$4,650 Salary and benefits for all staff involved in Parent Ed events	Parent participation was good for BTSN, conferences, and first two Town Hall meetings. Attendance dropped off for last two Town Hall meetings, although attendance at school events remained high throughout the year.

Sherwood Montessori LCAP Progress 2022-2023 Preparing for 2023-2024 Goals Revisions

Goal	Difference/improvement	Metrics	Expenditures	Rationale for potential changes
Goal 2.3: Improve parent involvement and volunteerism.	Records of parent involvement and volunteerism will be maintained (sign-in sheets, tracking hours) and show an increase over time.	Volunteer hours (adjusted to account for decreased enrollment)	$2,800 salary and benefits for staff involved in parent education events.	Parent volunteerism has been up, but parents indicated a decline in satisfaction regarding the opportunity the school has given parents to be involved in academic outcomes.
Goal 2.4: Increase attendance and graduation rates for all students and all subgroups and decrease chronic absenteeism and suspension rates.	PBIS program and attendance outreach efforts.	Attendance rates, suspension rates, SWIS data	$3,000 salary and benefits for staff involved in PBIS program, attendance outreach efforts. *Increased spending in resources here to support a new goal to address chronic absenteeism.*	Chronic absenteeism rates very high, Sherwood has been identified for program improvement and is in ATSI. A new goal for attendance must be created.
Goal 3.1: Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks.	The school will provide free or reduced lunch and free childcare with tutoring.	Student and community surveys.	$7,100 budgeted for snacks, staff time to manage lunch program *Actual spending will be much higher to include costs of after care/tutoring program*	Maintained after increase in funding prior year to cover increase in salaries/benefits and increase in students receiving frl. Suggest maintaining for this goal.
Goal 3.2 Socioeconomically disadvantaged students will have access free after school tutoring.	The school will provide free or reduced lunch and free childcare with tutoring. Continuing goal with improved with services after school/tutoring.	Student and community surveys.	$28,825 budgeted *Expenditures should be based on actual costs and increased to have co-coordinators.*	Feedback indicates a need to improve services provided with the Extended Day program. A model with Co-Coordinators who are more experienced staff will be put in place.
Goal 3.3 Socioeconomically disadvantaged students will	The school will provide free or reduced lunch	Student and community surveys.	$28,825 budgeted	Feedback indicates a need to improve services provided with the Extended

Sherwood Montessori LCAP Progress 2022-2023 Preparing for 2023-2024 Goals Revisions

Goal	Difference/improvement	Metrics	Expenditures	Rationale for potential changes
have access to free childcare before and after school.	and free childcare with tutoring. Continuing goal with improved with services after school/tutoring.		*Expenditures should be based on actual costs and increased to have co-coordinators.*	Day program. A model with Co-Coordinators who are more experienced staff will be put in place.
Goal 4: Socioeconomically disadvantaged students will have access to scholarships to attend field trips.	The school will provide scholarships to attend field trips for families that qualify for free or reduced lunch due to low income.	*Student surveys*	$4,000 budgeted *Continue to fund using actual expenses.*	Student data indicate high rates of satisfaction for the statements: “I am happy to be a student at this school” and “I get to do interesting activities at school” and “I feel like I’m part of the school community”, although older grades rate these lower. There are also narrative comments indicating students like field trips.

SHERWOOD MONTESSORI

REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS

Join Zoom Meeting
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Date/Time: **Thursday, June 15, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

B. CONSENT AGENDA (6:05)

B.1 Commendations Outgoing directors will receive commendations.

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.2 Minutes Approval Consider approval of minutes from Regular Meeting, May 18, 2023.

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 School Director Report
E.2.2 Treasurer Report

E.3 Action Items (6:30)

E.3.1 Original Budget 2023-2024
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: Approve the LCAP.

E.3.3 Local Indicators Report
A report of Local Indicators will be presented.
ACTION REQUESTED: Receive report.

F. CLOSED SESSION (7:00)

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 welcome new members.

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

RESOLUTION 061523a
RESOLUTION OF COMMENDATION

WHEREAS, Robyn Howley *was first appointed to serve on the Board of Directors of Sherwood Montessori in August, 2021, and continued her service for a period of twenty-three 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, *Robyn has discharged her Board duties as a Director, Vice Chair, and Secretary with a high level of competence, preparedness and objectivity; and*

WHEREAS*, Robyn brought to Sherwood Montessori her perspective as a parent and scholar; and*

WHEREAS, *Robyn 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 Robyn Howley 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 Robyn Howley 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 15th day of June, 2023.*

Michelle Yezbick, Director
Sherwood Montessori

Russell Shapiro, Chair of the Board
Sherwood Montessori

SHERWOOD MONTESSORI

RESOLUTION 061523b
RESOLUTION OF COMMENDATION

WHEREAS, Beth Hammer *was first appointed to serve on the Board of Directors of Sherwood Montessori in September 2020, and continued her service for a period of thirty-four 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, *Beth has discharged her Board duties as Treasurer and Secretary with a high level of accuracy, competence and accountability; and*

WHEREAS*, Beth brought to Sherwood Montessori her perspective as a parent, community member, and disabilities activist; and*

WHEREAS, *Beth 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 Beth Hammer 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 Beth Hammer 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 15th day of June, 2023.*

Michelle Yezbick, Director
Sherwood Montessori

Russell Shapiro, Chair of the Board
Sherwood Montessori

SHERWOOD MONTESSORI

REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS

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Meeting ID: 524 521 7471
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Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, May 18, 2023 – 6:00 p.m.**

AGENDA

A. CALL TO ORDER (6:00 p.m.)

Meeting called to order at 6:02 pm

A.1 Land Acknowledgement

Sherwood Montessori acknowledges that we are on the unceded ancestral homeland of the Mechoopda people. Dr. Maria Montessori said: "We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity." As Montessori educators, we recognize that the Mechoopda people are the experts on the way to walk on the path of life here, with respect, gratitude and responsibility for the land, flora, fauna, waters, and air of this place. We extend our respects to the Mechoopda ancestors, elders, and all their relations in affirming their sovereign rights.

A.2 Roll Call Russell Shapiro, Beth Hammer, Robyn Howley, Jolynn Aanenson, Tina Hanson-Lewis

Russell Shapiro, Robyn Howley, Tina Hanson-Lewis present; Jolynn Aanenson and Beth Hammer absent

B. CONSENT AGENDA (6:05)

B.1 Minutes Approval Consider approval of minutes from Regular Meeting, April 20, 2023.

Tina Hanson-Lewis motioned to approve; Robyn Howley seconded. All present board members approved.

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 School Director Report *Michelle presented*

E.2.2 Treasurer Report *Russell Shapiro presented the Treasurer report*

E.2.3 SMPO Report

E.2.4 Board Report *No board report, Russell discussed history behind size of current Sherwood Board of Directors*

E.3 Action and Discussion Items (6:30)

E.3.1 Local Control Accountability Plan (LCAP)

The Board will be asked to discuss the LCAP and allow for public input.

Action Requested: Discuss plan.

E.3.2 Book Discussion: *Diverse Families, Desirable Schools: Public Montessori in the Era of School Choice* (Debs, 2019) Chapter 6.

Book discussion tabled until June meeting

F. CLOSED SESSION (7:00) **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.

Board went into a closed session at 7:03 pm

G. FUTURE AGENDA ITEMS (7:25)

The Board will be asked to adopt the 2023-2024 Local Control Accountability Plan (LCAP) and approve the Original Budget for 2023-2024.

H. ADJOURNMENT (7:30) *Meeting adjourned at 7:42 pm*

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SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **School Director Report**

Date: June 15, 2023

Administrative

- We received our offer of facilities from CUSD. We will need to vacate Room 9, as was expected. We will also need to vacate Room 5 during the Winter Break if our enrollment on October 5th isn't at the number we projected.
- Our highspeed fiber optic internet project will be completed at long last. We have contracted Patrick Bosetti, a CUSD IT employee, to do the installation now that our switches finally arrived.

Employees, Interns, and Independent Contractors

- We have hired a speech and language pathologist for next year, which means all our certificated positions are filled.
- We have an equal number of open positions as employees who would like to come back in terms of instructional aides. We are working on job assignments to find the right spot for all.
- Our one position we are looking to fill for the 2023-2024 school year is the Behavioral Health Counselor position.

Legislation

- On May 31, SB 739, passed from the Senate Floor on a 28-0 vote and is headed to the Assembly. The bill will extend charter renewals for another year.

Community

- Our 8th grade graduation event now has a "rite of passage" element for all students to acknowledge their growth and place in the future. Special attention is given to the eldest of each plane as they will be moving up to another environment.
- The end of the school year was celebrated with field trips, class parties, and a whole school Water Fun event at the park.

SHERWOOD MONTESSORI

To: Board of Directors

From: Pat Casey, Business Manager

Subject: **Treasurer's Report**

Date: June 15, 2023 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 May 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 879,290.11 as of May 31, 2023 for the checking account.
- The expenses in May were for the normal operating cost.

Profit & Loss

- The May Profit & Loss report shows a Net Income of $ 92,213, which was increased by $ 21,684 of May LCF funds deposited in June 2023 along $ 13,658 of State ELOP/G.
- Cash Flow
  The school will end the year with a positive cash balance.

Sherwood Montessori
Profit & Loss YTD Comparison
July 2022 through May 2023

	Jul '22 - May 23
Ordinary Income/Expense	
Income	
8000-Revenues	
8010-8099 Revenue Limit Sources	843,882
8110-8290 Federal Revenues	170,441
8300-8599 Other State Revenue	
8311 - AB602 Spec. Educ.- SELPA	91,593
8312 - ERMHS LVL1	965
8312 - ERMHSLvl2	1,916
8550 - Mandate Block Grant	1,861
8560-State Lottery Revenue	13,001
8590-Categorical Funds	
AMIMG-6762	33,787
CSDER	425,106
Educator Effectiveness	8,987
ELOP - 2600	95,500
LREBG - 7435	144,699
PRE-K PLAN-IMPLEMENT	29,108
Total 8590-Categorical Funds	737,187
Total 8300-8599 Other State Revenue	846,523
8600-8799 Other Local Revenue	40,769
Total 8000-Revenues	1,901,614
Total Income	1,901,614
Gross Profit	1,901,614
Expense	
1000 Certificated Salaries	636,061
2000 Classified Salaries	445,972
3000-Employee Benefits	335,916
4000-Books and Supplies	42,772
5000 Services/Other Op. Exp.	348,680
Total Expense	1,809,401
Net Ordinary Income	92,213
Net Income	**92,213**

Sherwood Montessori
Board of Directors - Vendor Payments Report
May 2023

Type	Date	Num	Name	Memo	Account	Amount
Check	05/01/2023	ACH	Macquarie Equipment Capit...	Kyocera Copier Lease 2023 ...	Copier Lease	223.00
Check	05/02/2023	EFT	Achieve Charter School of ...	INV 3575 DOC SERVICE - A...	Contracted Service	250.00
Check	05/02/2023	9652	Chico Country Day	NATALIE WREN - NURSE -I...	Contracted Service	1,291.91
Check	05/03/2023	DBT	1 & 1 Internet Inc.	Internet hosting IONOS - 3M...	Website, Hosting	45.00
Check	05/04/2023	9673	CUSD	2022-23 FUA - INV 23-00166...	CUSD FUA Charges	2,573.93
Check	05/04/2023	9674	Kayla Jeffrey	LIVESCAN	LiveScan and TB Test Servic...	66.00
Check	05/04/2023	EFT	Comcast 4454	SERVICE - 2023 MAR-APR	Internet Service Provider	248.13
Check	05/04/2023	EFT	Heather Fisher	T-BAR LUNCH	5200-Travel and Conferences	362.33
Check	05/04/2023	DBT	EARTHLY GOODS LTD	SEED PACKETS - ADVERTI...	Advertising	312.50
Check	05/04/2023	DBT	Amazon.com	MURS handheld radio	LCAP	184.00
Check	05/04/2023	DBT	Amazon.com	SHEET PROTECTOR	Instructional Supplies	12.33
Check	05/04/2023	DBT	Raley's	SUPPLIES	Instructional Supplies	35.68
Check	05/04/2023	EFT	California Water Service Co...	SERVICE 2023 APRIL	Water	51.63
Check	05/05/2023	DBT	SUPER DUPER	SPEECH/LANGUAGE SELPA	Instructional Supplies	38.80
Check	05/06/2023	EFT	Laura Swanson	BH SUPPLIES	Instructional Supplies	33.38
Check	05/07/2023	DBT	Amazon.com	#2 PENCIL -returned	LCAP	24.89
Check	05/08/2023	DBT	Southern Oregon University	HOUSING - ASHLAND FIEL...	Field Trips and Assemblies	200.00
Check	05/08/2023	DBT	Walmart	PHONE - EXT DAY	LCAP	73.79
Check	05/08/2023	DBT	Oregon Shakespeare Festival	DEPOSIT	Ashland Trip	45.00
Check	05/10/2023	EFT	Waste Management	SERVICE 2023 APR	Trash/Recycling	133.76
Check	05/10/2023	EFT	Directional Ad-Vantage Hol...	CHICO MALL KIOSK	Advertising	295.00
Check	05/10/2023	9675	Advanced Document	INV99341	Copier Lease	600.30
Check	05/10/2023	9676	Steven Duke	TECHNICAL SUPPORT - IN...	Maintenance Supplies	140.00
Check	05/10/2023	DBT	Costco	2-6' TABLES	Office Supplies	140.70
Check	05/10/2023	DBT	Walmart	ATT SIM KIT - EXT DAY - R...	Extended Day	11.32
Check	05/10/2023	9670	PARK AVENUE PEST CON...	INV 587	Pest Control	85.00
Check	05/11/2023	DBT	Costco	SNACKS-SUPPLIES - EXT ...	Food (Instructional)	355.14
Check	05/11/2023	DBT	Amazon.com	CORRECTION TAPE	Office Supplies	8.65
Check	05/12/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Conferences	100.00
Check	05/12/2023	DBT	Walmart	PONG BALL - COLOR DUCK	Instructional Supplies	32.91
Check	05/12/2023	DBR	FoodMaxx	SNACKS	Extended Day	4.99
Check	05/12/2023	DBT	Amazon.com	POTTY SEAT-BOYS	Instructional Supplies	5.40
Check	05/13/2023	ACH	COSTCO VISA CARD	2022 15TH PURCHASES M...	SHERWOOD COSTCO VISA	78.75
Check	05/14/2023	ACH	HP LEASE 7603	Lease Payment - Customer I...	HP DIRECT LEASE	319.17
Check	05/14/2023	DBT	Amazon.com	#2 PENCIL	Instructional Supplies	24.89
Check	05/14/2023	DBT	Amazon.com	ERASABLE PENS	Instructional Supplies	20.99
Check	05/15/2023	DBT	NCMPS	ANNUAL MEMBERSHIP	5300-Dues and Membership	130.00
Check	05/17/2023	DBT	FoodMaxx	SNACKS	Extended Day	78.38
Check	05/17/2023	DBT	Amazon.com	CARDSTOCK	Instructional Supplies	13.81
Check	05/18/2023	EFT	Comcast Business 9110	Service APR-MAY	Internet Service Provider	180.49
Check	05/18/2023	EFT	PG & E	SERVICE APRIL	Electricity	465.40
Check	05/18/2023	9677	Comcast Ethernet	Service-2742 2023 MAY	Ethernet - Fiberoptic	2,534.65
Check	05/18/2023	9678	Hernandez Cleaning Service	SERVICE 2023 APRIL	Housekeeping Services	5,000.00
Check	05/18/2023	DBT	Wufoo	SERVICE - 2023 APR-MAY	Online List Management	19.00
Check	05/22/2023	9679	Hanna Kerr	LIVE SCAN	LiveScan and TB Test Servic...	66.00
Check	05/23/2023	9666	Chico Country Day	NATALIE WREN - NURSE -I...	Contracted Service	1,291.91
Check	05/23/2023	DBT	Verizon Wireless	SERVICE APR-MAY 2023	Telephone, Cellular	94.38
Check	05/23/2023	DBT	Amazon.com	INK REFILLS - ERASABLE	Office Supplies	12.37
Check	05/23/2023	DBT	Amazon.com	MONTHLY FEE	Instructional Supplies	16.23
Check	05/24/2023	DBT	ARCO PUMPPASS	Gas cards	5200-Travel and Conferences	100.00
Check	05/24/2023	ACH	Intuit	QuickBooks ENTERPRISE	Software Licensing	1,281.00
Check	05/25/2023	DBT	Dollar Tree	LCAP COMMUNITY EVENT	LCAP	27.06
Check	05/25/2023	DBT	Amazon.com	WATER BALLONS-COTTON...	LCAP	43.28
Check	05/26/2023	DBT	Office Depot	ENVELOPES	Office Supplies	63.30
Check	05/26/2023	DBT	TEA BAR CAFE	Meal - UE Meeting -LCAP	Food - Meetings	100.43
Check	05/27/2023	DBT	Amazon.com	WATER BALLONS-COTTON...	LCAP	35.92
Check	05/27/2023	DBT	Amazon.com	POTATO SACK RACE BAGS	LCAP	33.01
Check	05/30/2023	DBT	Walmart	BEACH-POOL BALL - LCAP ...	LCAP	41.81
Check	05/31/2023	DBT	FoodMaxx	SNACKS	Extended Day	57.67
Check	05/31/2023	DBT	Costco	SNACKS-SUPPLIES - EXT ...	Food (Instructional)	46.10
Check	05/31/2023	DBT	WORLD MARKET	breakfast 7-8	Instructional Supplies	8.99
Bill	05/31/2023	INV ...	Pat Casey	CONTRACT SERVICE 2023 ...	Business Manager Services	4,400.00
TOTAL						**24,570.46**

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **2023-2024 Original Budget**

Date: June 15, 2023

SUMMARY

The Budget Committee met on June 5th to create the draft of the original budget for 2023-2024.

DISCUSSION

Assumptions for creating the proposed budget included:
Governor's Proposal assumed to be accepted by Legislature
Budget based on 95 ADA
2.5% raise for all employees, base rate for hourly up from $18.00 to $19.00
Estimated $200,000 of funds as ongoing revenue, estimated offset by expenses
One time fiber optic equipment cost of $5,000
Certificated salary costs down by one position

ACTION REQUESTED

Adopt 2023-2024 Original Budget

Attachments: Draft of 2023-2024 Original Budget, Organizational Chart

2023-24	FUNDING AT 91 ADA	FUNDING AT 95 ADA			
6/15/2023					
ORIGINAL BUDGET		105 Enroll. x 90% attendance	CHANGE		
	2022-23 2ND INTERIM BUDGET	2023-24 ORIGINAL BUDGET			
Revenue					
8011 Local Control Funding	460,007	632,137			
8012 Education Protection Act	264,108	297,918			
8019 Prior Year Overpaid Adjustment	(57,778)		57,778		
8096 In Lieu Taxes	302,346	270,000			
Subtotal LCFF Revenues	***968,683***	***1,200,055***	231,372		
8290 - TITLE I + ESSER TOTAL	**222,180**	**50,000**	(172,180)		
8181 - Spec. Educ.- SELPA Fed	-		-		
8311 - Spec. Educ. - SELPA State	68,000	68,000	-		
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	***8,987***		(8,987)		
8590 - ELOG-P	***54,280***	***50,000***	(4,280)		
8590 - UPK	***29,108***	***25,000***	(4,108)		
8590 - AMIM	***33,787***		(33,787)		
8590 - LREBG	***144,700***		(144,700)		
8699 Other Local Revenue	3,000	3,000	-		
TOTAL REVENUES	**1,568,225**	**1,431,555**	(136,670)		
Expense					
1000 Certificated Salaries	584,880	532,580	(52,300)		30%
2000 Classified Salaries	615,201	542,266	(72,935)		31%
3000 Employee Benefits	330,037	306,110	(23,927)		17%
SUBTOTAL	***1,530,118***	***1,380,956***	(149,162)		78%
4100 Texts and Core Curricula	-	3,000	3,000		
4200 Reference Materials	-	3,000	3,000		
4300 Materials and Supplies	33,000	27,400	(5,600)		
4400 NonCap Equipment	-	12,000	12,000		
4700 Food (Nutrition)	3,000	2,000	(1,000)		
SUBTOTAL	***36,000***	***47,400***	11,400		3%
5200 Travel and Conferences	-	3,000	3,000		
5300 Dues and Memberships	2,900	1,700	(1,200)		
5400 Property/Liability Insurance	36,000	38,000	2,000		
5500 Operations / Housekeeping	108,200	103,100	(5,100)		
5600 Rentals, Leases, and Repairs	11,700	12,000	300		
5800 Prof. & Consulting Services	157,400	164,300	6,900		**4%**
5900 Communications	15,400	24,200	8,800		
SUBTOTAL	***331,600***	***346,300***	14,700		20%
6200 CAPITAL OUTLAY- BLDG			-		
TOTAL EXPENDITURES	**1,897,718**	**1,774,656**	**(123,062)**		100%
Net Income	***(329,493)***	***(343,101)***	**ADA Equiv.**	**-34**	
Unassigned/Unappropriated - Prior Year	**785,132**	**500,000**			
Restricted Grant Funds - Prior Year		**120,000**			
Unassigned/Unappropriated - Proj. Yr End	**700,000**	**156,899**	**ADA Equiv.**	**16**	
Reserve - Economic Uncertainties	**120,000**	**120,000**	**Est. 1 mos. salary/benes.**		
Unassigned/Unappropriated Amount	**86,662**		**ADA Equiv.**	**0**	
Restricted Grant Funds	**493,338**	**36,899**			

SHERWOOD MONTESSORI

MEMORANDUM

To: Board of Directors

From: Michelle Yezbick, School Director

Subject: **Local Control Accountability Plan (LCAP) Draft**

Date: June 15, 2023

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 18, 2023.

ACTION REQUESTED

Approve LCAP.

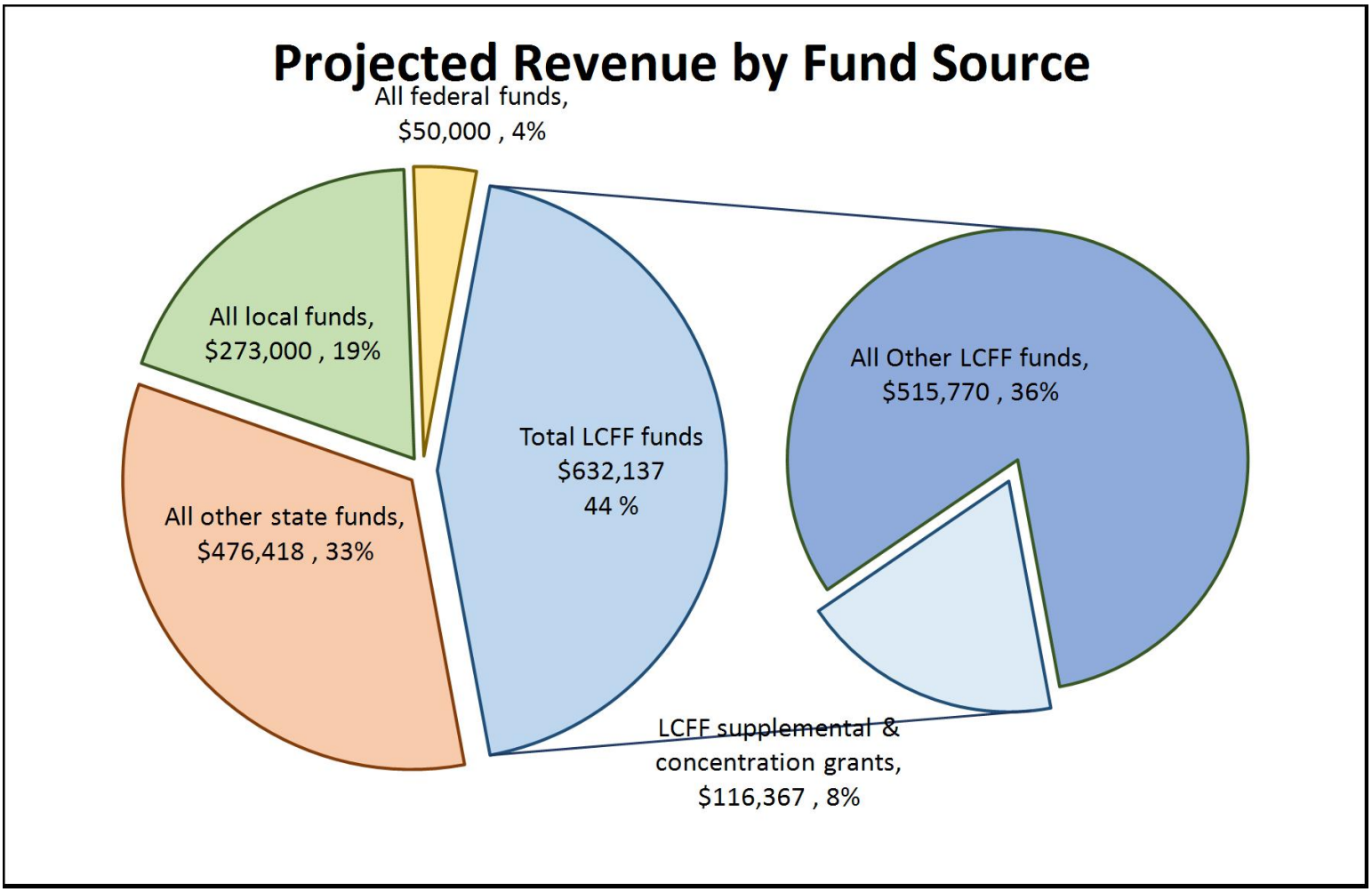
Attachment: DRAFT LCAP 2023-2024

LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sherwood Montessori
CDS Code: 04614240121475
School Year: 2023-24
LEA contact information:
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Director
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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 2023-24 School Year

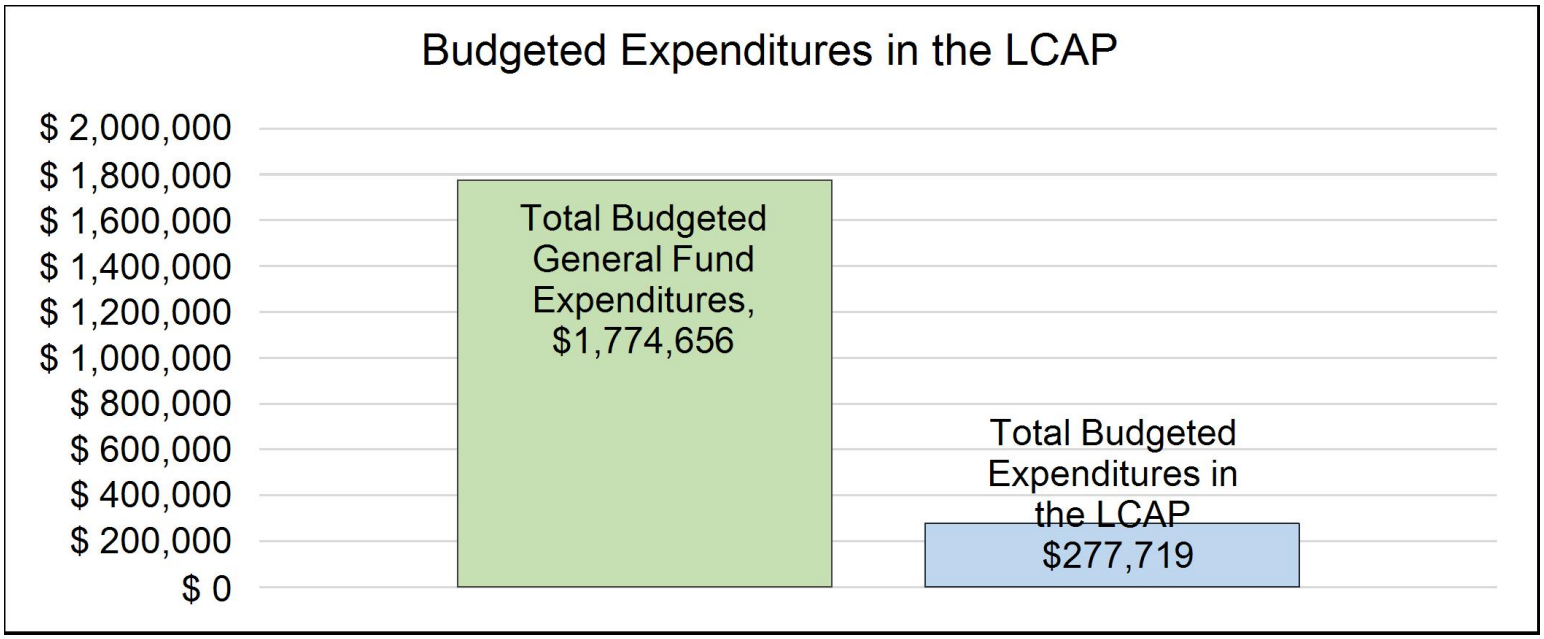


This chart shows the total general purpose revenue Sherwood Montessori expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sherwood Montessori is $1,431,555, of which $632,137 is Local Control Funding Formula (LCFF), $476418 is other state funds, $273,000 is local funds, and $50,000 is federal funds. Of the $632,137 in LCFF Funds, $116,367 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 2023-24. 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 $1,774,656 for the 2023-24 school year. Of that amount, $277,719 is tied to actions/services in the LCAP and $1,496,937 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. Instructional aides in classrooms TK-6.

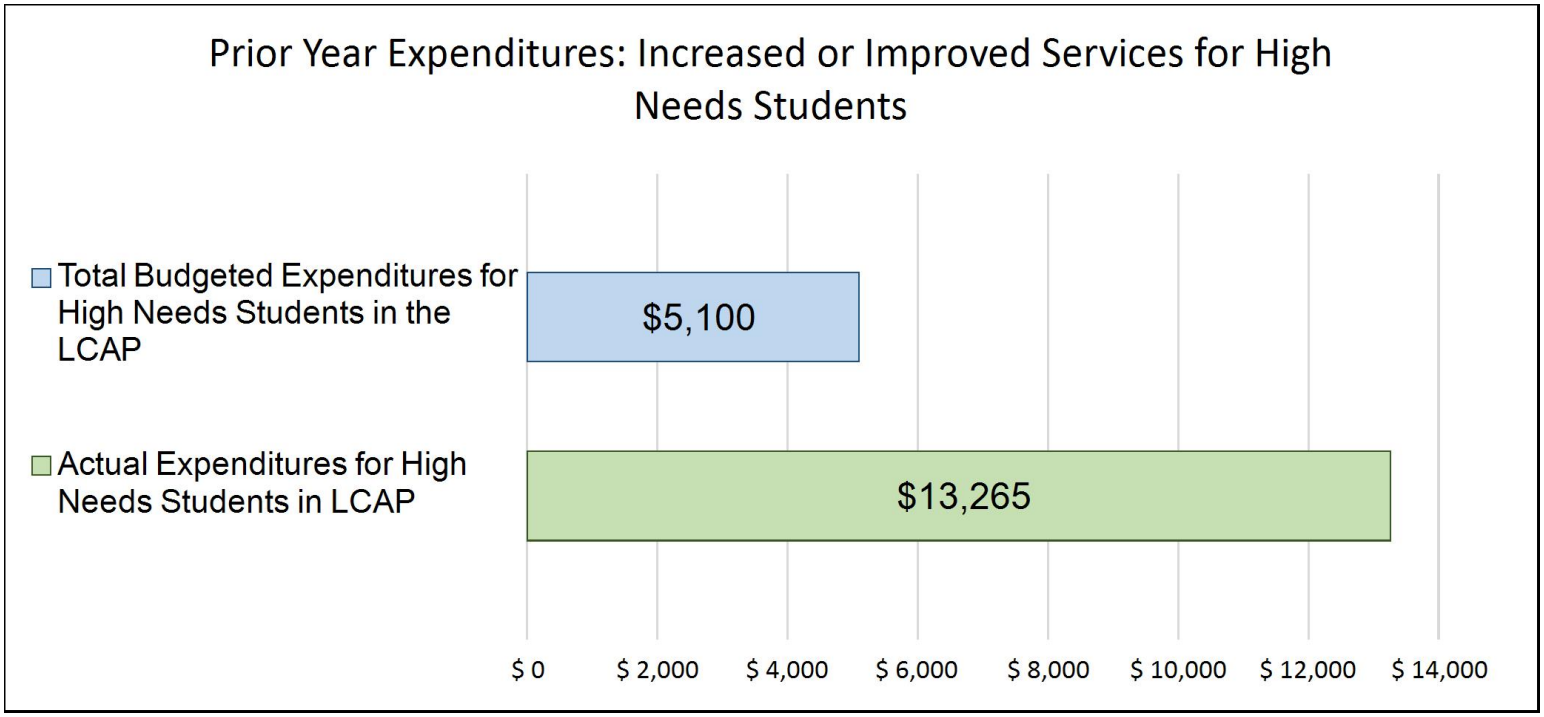
Increased or Improved Services for High Needs Students in the LCAP for the 2023-24 School Year

In 2023-24, Sherwood Montessori is projecting it will receive $116,367 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 $13,265 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 2022-23



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 2022-23, Sherwood Montessori's LCAP budgeted $5,100 for planned actions to increase or improve services for high needs students. Sherwood Montessori actually spent $13,265 for actions to increase or improve services for high needs students in 2022-23.

Local Control and 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 5303456600

Plan Summary [2023-24]

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 105 students with multi-age groups. We have two classrooms with learners ages 4-6 (TK/K), 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, the TK/K classrooms moved 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 the greatest increases in the percentage of parents who reported being satisfied or very satisfied with the teachers at Sherwood, the support given to struggling learners, support for students' emotional well-being at school, and school climate in terms of respectfulness and inclusivity.

From the students, the highest rated areas overall were for the Enrichment program, for the statement "I am happy to be a student at this school", and "I get to do interesting activities at school".

The Dashboard shows a 34.9% chronic absenteeism rate for 2022 and the school is estimating a rate of 22% for 2023, showing some progress made.

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 support given to students who need academic challenge, level of academic challenge, and opportunity to make an impact in academic outcomes for my student/s. Flexible grouping will be implemented when students show a need for challenge, and the school will increase communication in the ways that parents can make an impact in academic outcomes for their students.

From the students, the lowest rated areas overall were respect and kindness shown by other students, the help received to resolve conflicts with other students, and the rules being fair and easy to understand. A team of teachers and the school director has been working with the

Northern California Educatinal Leadership Coalition to refine our PBIS (Positive Behavior Interventions and Support) program. We will continue this work in the 2023-2024 school year and hope to see an improvement in the data from the student surveys.

Like the majority of California public schools, chronic absenteeism was a big concern with a rate of 34.9% for 2022 and an estimated reate of 22% for 2023. Sherwood students scored very low on the Math CAASPP test and Low on the ELA CAASPP. Locally administered verifiable assessment data show more than a year's growth for many of the students who were not reaching standard on the CAASPP in 2022, but the gap was not closed. This past year, Sherwood used IXL to address the various learning gaps among students not reaching grade level expectations in math. For students needing support in ELA, SIPPS (Systematic Instruction in Phonological Awareness, Phonics, and Sight Words) and Montessori Reading Pathways were implemented. These programs will continue in the 2023-2024 school year.

No student groups showed significant performance gaps in any of the Dashboard indicators.

LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

Feedback from educational partners indicate an appreciation for the efforts the school has made for students' emotional well-being at school, these programs will continue. There was also an increase in satisfaction for support given to struggling learners. Last year, a behavioral health counselor was put in place to be available when students need help to deescalate which allowed all services and intervention supports to run without interruption when students were in crisis. This position will continue, as will the change put in place last year to have the school's director run Student Success Team meetings for stuents needing more support with academics, behavior, or both.

Preliminary data for the 2022-2023 school year shows progress in bringing the chronic absenteeism rate down from a high of 34.9% in 2022. This is likely to do with the pandemic have less impact, but Sherwood will also continue with the tiered efforts to re-engage students with truancy and will bring back the attendance incentives that were part of the PBIS program in place before the pandemic.

Another pre-pandemic practice that will be brought back and can address the lower satisfaction around providing academic challenge is having flexible grouping for learners who are showing precocious abilities. Students will be able to access curriculum at the next plane of development, that is, upper elementary students join middle school for identified subjects, lower elementary students would join upper elementary, etc. The multiple-age groupings allow this to happen within classrooms, but some children need to access curriculum beyond what is housed in their classroom. Teachers will receive professional development in how to differentiate curriculum and how to engage gifted students with appropriate challenge. The school will also provide clear information for parents on how to partner with the school to make an impact in academic outcomes for all learners as satisfaction in this area fell from last year.

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 eligible for ATSI.

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Sherwood is a single-site charter school and will be directly developing its comprehensive support and improvement plans. Sherwood is conducting needs assessment and identifying evidence-based interventions. As a single-site LEA, there are no resource/funding inequities to be addressed.

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Sherwood will evaluate attendance data no less than every two weeks and verifiable academic data in areas of ELA and math no less than three times per school year.

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 March 9, March 23, March 30, April 6, April 13, April 20, April 27 and May 4. 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 April 14th and May 11th 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 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 6, 2023 and was available through May 8, 2023. Invitations and reminders to complete the survey were included in the school announcements on April 6, April 13, April 20, and April 27. An announcement promoting the survey only without other news items was sent on April 25. A paper flier was given to parents and guardians asking for participation in the survey.

On September 13, December 6, February 7, and April 4 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 May 8, 2023 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 15, 2023.

A summary of the feedback provided by specific educational partners.

Feedback from students-Students reported most satisfaction with feeling happy to be a student at the school, that they were able to do interesting activities at school, and with enrichment classes. They were most dissatisfied with the way they were treated by other students, the rules, and the ways the school helped them to resolve conflicts with other students.

Feedback from parents-Parents were happy with the teachers, the support for students' emotional well-being at school, support given to struggling learners, curriculum in terms of Montessori authenticity and school climate/overall satisfaction. They were unhappy with the support given to students who need academic challenge, with the level of academic challenge, and with the opportunity to make an impact in academic outcomes for students (declined from 90% satisfied/very satisfied last year to 81% this year).

Feedback from teachers and staff-Students continue to show need for counseling and other mental health supports. They noted that the focus on these needs may account for the decline in satisfaction for the level of academic challenge.

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

Sherwood will continue to provide enrichment classes, counseling and mental health support. There will be more communication about the ways to support learning at home and opportunitites for academic challenge will be offered. The SST process will continue and teachers, staff, and parents will be informed about how the process works.

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. Focus Goals: 1.1: Provide highly qualified teachers for all students. 1.2: Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). 1.3: Provide a broad range of Montessori materials. 1.4: Provide a facility in good repair and maintain recess equipment. 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		100% highly qualified credentialed teachers
CAASPP Scores	33.4 Points Below Standard for ELA 90 Points Below Standard for math	61.8 Points Below Standard for ELA 100.2 Points Below Standard for math	TBD		20 Points Below Standard for ELA 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.	New Montessori materials ordered for the second TK/K classroom, but few arrived. Materials showing wear or missing parts were replaced.		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.	Refurbished restrooms were a big improvement. Check-out system was implemented and the recess and PE equipment was well cared for throughout the year.		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.	90% 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.	$1,575.00	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.	$33,382.00	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.	$3,009.00	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.	$19,588.00	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.	$11,119.00	No

Goal Analysis [2022-23]

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.

Fewer Montessori materials were purchased than were planned. Montessori Outlet took our order for a Dream Package for the new TK/K classroom and delivered very few of the materials included in the package, citing production and shipping delays due to the pandemic. Most of the money was finally reimbursed in April, 2023.
Instead of having a Director of MTSS running SSTs, revenues were reassigned to hiring social workers who could support students with mental health needs. The role that the former Director of MTSS played in coordinating and attending SSTs was filled with the School Director and the Administrative Assistant.

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.

Because Montessori Outlet, our former provider of Montessori materials, failed to fill the order placed in early July, we were reinbursed for most of the order in April. By then, the teacher of the TK/K classroom had used materials that were in storage or purchased individual materials.
The elimination of the Director of MTSS position was the greatest difference in budgeted vs estimated actual expenditures. These revenues were spent to support students' mental health needs and are not included in a LCAP goal.

An explanation of how effective the specific actions were in making progress toward the goal.

1.1: Provide highly qualified teachers for all students: maintained 100% credentialed teachers. 97% of educational partners surveyed indicated they were satisfied or very satisfied with the teachers at Sherwood.
1.2: Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS): 90% of educational partners surveyed indicated they were satisfied or very satisfied with the curriculum in terms of Montessori authenticity. Star Renaissance data in ELA and math showed greater than a year's expected growth for students overall.
1.3: Provide a broad range of Montessori materials. 90% of educational partners surveyed indicated they were satisfied or very satisfied with the curriculum in terms of Montessori authenticity.
1.4: Provide a facility in good repair and maintain recess equipment. Facilities Inspection Tool data indicate that maintenance issues were addressed. Recess equipment has been checked out and returned daily.
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. 90% of educational partners surveyed indicated they were satisfied or very satisfied with the support given to struggling learners.

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.

Metrics showed high satisfaction with survey questions related to goals, so actions will continue.

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. 2.1 Ensure that parents understand the ways the school communicates with students' families. 2.2 Ensure that parents understand the nature of the Montessori method of education. 2.3 Improve parent involvement and volunteerism. 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		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. 91% of respondents satisfied or very satisfied with satisfaction in terms of: opportunity by the school to make an	90% of respondents satisfied or very satisfied with satisfaction in terms of: curriculum, in terms of Montessori authenticity. 81% of respondents satisfied or very satisfied with satisfaction in terms of: opportunity by the school to make an		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
		impact in academic outcomes for my student/s.	impact in academic 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 30 volunteer hours per year	35% of families reported volunteer hours; 6% of families met or exceeded 30 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	34.9% Chronic Absenteeism Rate	TBD estimated 22%		10% Chronic Absenteeism Rate
Chronic absenteeism rate: Subgroup Hispanic	25% Hispanic Chronically Absent	Hispanic is no longer a numerically significant subgroup.	Hispanic is no longer a numerically significant subgroup.		10% Hispanic Chronically Absent
Decreased or maintained suspension rate	2.8% suspension rate	2.797% suspension rate	TBD estimated 1.6%		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.	$6,000.00	No
2.2	Ensure that parents understand the nature of the Montessori method of education.	Parents will have opportunities to learn about Montessori education.	$31,259.00	No

Action #	Title	Description	Total Funds	Contributing
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.	$5,038.00	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.	$15,384.00	No

Goal Analysis [2022-23]

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 no substantive differences in planned actions and actual implementation of 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.

The goal for ensuring parents understand the nature of Montessori education was underfunded once actions in this area increased. The school made a concerted effort to suport parents' understanding of Montessori education not only through Parent Education events as previously planned, but at Back to School Night, Parent Education events, Open House, and other school events. The increase in expenditures represents time spent by teachers and administration to support parents' understanding of Montessori education.

An explanation of how effective the specific actions were in making progress toward the goal.

2.1 Ensure that parents understand the ways the school communicates with students' families: The office followed up with any parents who were reported as non-contactable and updated phone numbers or emails to maintain 100% were contactable.
2.2 Ensure that parents understand the nature of the Montessori method of education: Back to School Night, Parent/Teacher Conferences and Open House were all well-attended. The Zoom parent education event "The Montessori Way" did not have as many attendees as past Zoom events, indicating that our parent group may be tired of remote events and want to return to in-person or hybrid presentations.
2.3 Improve parent involvement and volunteerism: The percentage of families reporting volunteer hours grew for the third year in a row. We still have many parents who volunteer but do not report their hours.
2.4 Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates: Chronic absenteeism fell from 34.9% in 2021-2022 to 21-22% (at time of writing) in 2022-2024. Suspension fell from 2.797% to 1.6%.

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 school will continue to support parents understanding of Montessori education throughout many school events, and will increase efforts to inform parents about how they can support their students at home. The school will also continue with its tiered-reengagement plan for chronic absenteeism, as well as add incentives for regular attendance in the form of recognitions and acknowledgements for students and classrooms with high attendance.

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 Math 124.3 points below standard	ELA 82.6 points below standard Math 107.4 points below standard	TBD		ELA 40 points below standard 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.	$8,713.00	Yes
3.2	Socioeconomically disadvantaged	Students will have access to free tutoring after school as described in our Extended Learning Plan.	$69,050.00	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.	$69,050.00	Yes

Goal Analysis [2022-23]

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 no 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.

More was spent on the Extended Day program as it became very popular. Sherwood began offering free child care once the State began funding it, and has run a summer program each year since 2021.

An explanation of how effective the specific actions were in making progress toward the goal.

Socioeconomically disadvantaged students will have access to free or reduced lunch, free after school tutoring, and free child care before and after school: CAASPP scores increased in math but fell in English language arts between the baseline year, 2019, and Year 1, 2022. Scores are not yet available for the 2023 CAASPP administration.

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.

Especially considering the base year was pre-COVID and Year 1 is post, good outcomes are being seen with this goal. We may add Star Renaissance data now that we have collected this for two years as a metric for this goal.

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 on filed trips is essential.	78% of students agree or strongly agree that they are happy to be students at the school. Teachers report that including all students on field 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.	$4,552.00	Yes

Action #	Title	Description	Total Funds	Contributing
	scholarships to attend field trips.			

Goal Analysis [2022-23]

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 no 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.

Socioeconomically disadvantaged students will have access to scholarships to attend field trips: In 2022, the low income student group has 40.8% chronic absenteeism.

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 [2023-24]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
116,367	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
11.87%	0.00%	$0.00	11.87%

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 were 6.9% lower lower in 2022 than the CAASPP math scores for all students. This is an improvement from 2019 when low-income students were 32% lower. In ELA, the CAASPP scores of our low-income students were 28.8% lower in 2022 than all students. This is an improvement from 2019 when low-income students were 61.4% lower than all students.

In order to address this condition of our low-income students, we will continue to 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, as we saw in 2022.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Free tutoring and child care supports foster youth, English learners and low-income students by giving them more time to engage in educational activities. Free lunches and snack ensure that they are able to learn. Field trips ensure that they want to come to school.

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

2023-24 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	$107,045.00	$170,674.00			$277,719.00	$232,148.00	$45,571.00

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 Students with Disabilities	$1,575.00				$1,575.00
1	1.2	Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS).	All	$30,264.00	$3,118.00			$33,382.00
1	1.3	Provide a broad range of Montessori materials.	All	$3,009.00				$3,009.00
1	1.4	Provide a facility in good repair and maintain recess equipment.	All		$19,588.00			$19,588.00
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 Students with Disabilities	$11,119.00				$11,119.00
2	2.1	Ensure that parents understand the ways the school communicates with students' families.	All	$6,000.00				$6,000.00

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	$28,704.00	$2,555.00			$31,259.00
2	2.3	Improve parent involvement and volunteerism.	All	$3,838.00	$1,200.00			$5,038.00
2	2.4	Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates.	All	$15,384.00				$15,384.00
3	3.1	Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks.	Low Income	$2,600.00	$6,113.00			$8,713.00
3	3.2	Socioeconomically disadvantaged students will have access to free after school tutoring.	Low Income		$69,050.00			$69,050.00
3	3.3	Socioeconomically disadvantaged students will have access to free child care before and after school.	Low Income		$69,050.00			$69,050.00
4	4.1	Socioeconomically disadvantaged students will have access to scholarships to attend field trips.	Low Income	$4,552.00				$4,552.00

2023-24 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
980,680	116,367	11.87%	0.00%	11.87%	$7,152.00	17.87%	18.60 %	**Total:**	$7,152.00
								LEA-wide Total:	$7,152.00
								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		$2,600.00	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			8%
4	**4.1**	Socioeconomically disadvantaged students will have access to scholarships to attend field trips.	Yes	LEA-wide	Low Income		$4,552.00	3.87%

2022-23 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	$262,530.00	$277,719.00

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	$1,575.00
1	**1.2**	Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS).	No	$26,980.00	$33,382
1	**1.3**	Provide a broad range of Montessori materials.	No	$4,587.00	$3,009
1	**1.4**	Provide a facility in good repair and maintain recess equipment.	No	$14,700.00	$19,588
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	$130,963.00	$11,119
2	**2.1**	Ensure that parents understand the ways the school communicates with students' families.	No	$4,600.00	$6,000
2	**2.2**	Ensure that parents understand the nature of the Montessori method of education.	No	$4,650.00	$31,259
2	**2.3**	Improve parent involvement and volunteerism.	No	$2,800.00	$5,038

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	$3,000.00	$15,384
2	**2.5**				
3	**3.1**	Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks.	Yes	$7,100.00	$8,713
3	**3.2**	Socioeconomically disadvantaged students will have access to free after school tutoring.	Yes	$28,825.00	$69,050
3	**3.3**	Socioeconomically disadvantaged students will have access to free child care before and after school.	Yes	$28,825.00	$69,050
4	**4.1**	Socioeconomically disadvantaged students will have access to scholarships to attend field trips.	Yes	$4,000.00	$4,552

2022-23 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)
	$5,100.00	$151,365.00	($146,265.00)	12.00%	22.87%	10.87%

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)
3	3.1	Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks.	Yes	$1,100.00	$8,713	3%	3%
3	3.2	Socioeconomically disadvantaged students will have access to free after school tutoring.	Yes		$69,050	3%	8%
3	3.3	Socioeconomically disadvantaged students will have access to free child care before and after school.	Yes		$69,050	3%	8%
4	4.1	Socioeconomically disadvantaged students will have access to scholarships to attend field trips.	Yes	$4,000.00	$4,552	3%	3.87%

2022-23 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		0.00%	0.00%	$151,365.00	22.87%	40.55%	$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 Data**

Date: June 15, 2023

SUMMARY

Schools in California that receive the LCFF (Local Control Funding Formula) are requried to have certain data reviewed by their boards of education in a public meeting in June when the Original Budget for 2023-2024 is approved and the LCAP is adopted.

DISCUSSION

The California Department of Education is requiring all schools and LEAs (local education area) to submit to their boards, in a public meeting, a presentation of the data collected for Local Indicators. There are 8 State Priorities, not all are relevant to Sherwood Montessori. The attached slide presentation describes each of the areas' data that has been collected for to fulfill this requirement.

ACTION REQUESTED: Approve Local Indicators Data

Attachment: Local Indicator Data Presentation



CA Dashboard Local Indicators

Board of Directors

Sherwood Montessori

June 15, 2023

Big Ideas for CA Dashboard Local Indicators

- 5 Local Indicators complete the Dashboard
  - Compliment the 6 State Indicators
  - Met/Not Met/Not Met for 2 or More Years
  - Have transparency requirements
- Must be populated by Nov. 16
- **Process** is what's important; not colors
- Narrative required but evidence kept locally

Priority 1 – Basic Conditions

- Number/Percentage of teacher misassignments/vacant positions
  - **0**
- Number/Percentage of students without CCSS textbook access
  - **0**
- Number of identified instances where facilities do not meet "Good Repair"
  - **0**

Priority 2 – Implementation of State Academic Standards

Sherwood teachers did extensive work spanning two years' time (2020-2021 through 2021-2022) to identify "Essential Standards" from the California Common Core State Standards in English Language Arts and Math. These standards were selected with the following guiding questions:

- **Endurance:** Do students need to know this standard for the long haul?
- **Leverage:** Is this standard something that crosses more than one curricular area?
- **Readiness:** Is this standard a prerequisite for future learning?
- Does this standard represent something we'd be willing to spend intervention time reteaching?

This year, report cards were revised to align with the Essential Standards and assessment items were identified that informed student progress on the chosen Standards.

Priority 3 – Parent Engagement

- A summary of the data gleaned from the 2022-2023 Community Survey was presented at the May, 2023 Board Meeting.

- Strengths and progress in Building Relationships Between School Staff and Families:

Sherwood has high satisfaction ratings from the community survey for "School climate/overall satisfaction", "Teachers at Sherwood", "Support Given to Struggling Learners", and "Students Emotional Well-Being at School". Sherwood has a bilingual/biliterate Office Manager available for Spanish speaking families and students.

- Focus area(s) for improvement in Building Relationships Between School Staff and Families.

Focus will be to improve the communication between teachers and parents regarding "Opportunity to Make an Impact in Academic Outcomes for My Student/s", especially in terms of students who need an academic challenge. The "Opportunity" metric on the Community Survey fell from 91% satisfied or very satisfied to 81%, still high, but trending in the wrong direction. "Level of Academic Challenge" fell to a five-year low of 71% and "Support Given to Students Who Need Academic Challenge" fell from 74% in 2021-2022 to 68% in 2022-2023.

Priority 6 – School Climate

- The Board was given a copy of the LCAP Sherwood Community Survey 2023 at the May 18, 2023 meeting of the Board of Directors. A presentation included highlights and areas for improvement based on the data.
- Data regarding school climate trended high for adults and lower for students. Potential validity issues with student data were discussed and changes to improve data validity for next collection will be implemented: i.e. Opportunity to understand of the meaning of the questions with questions & answers, opportunity to have questions read aloud, Likert scale for all ages will be implemented.

Priority 7 – Course Access

Narrative summary included:

- We measured course access by evaluating the implemented curricula and MTSS records.
- We found that curricula represents all areas in the State Priorities.
- Identified Barriers include: There is a need to calibrate staff understanding regarding giving access for all students.
- Actions being taken include: Sherwood will participate in the California Scaling up Multi-System of Support Phase 3 initiative